Concord Cloud Fax

Administrator Guide

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Contents

Introduction

Concord Cloud Fax is a world-class digital fax service with industry leading **reliability**, **security**, and **support**. As a Concord Cloud Fax **administrator**, you will have access to the Concord Cloud Fax **Admin Portal**, a web-based application that lets you create and manage Cloud Fax **users** and **administrators**, as well as access **activity reports** on your inbound and outbound fax traffic.

This guide is intended to provide instructions to Concord Cloud Fax Administrators operating at the **Company** or **Department** levels. Access to specific functions of the Cloud Fax Admin Portal may be **limited** based on account level and access rights. Additional administrative guides and resources may be found at the Concord Resource Pages below:

Cloud Fax Resources
NEXTSTEP Resources

Disclaimer

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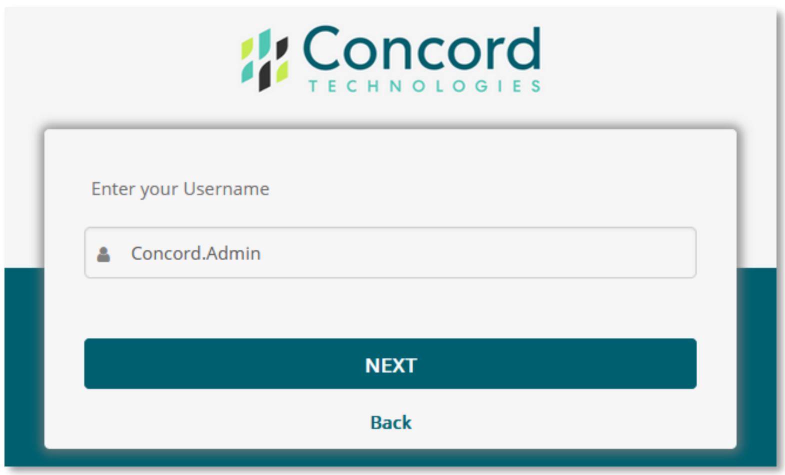
Logging In

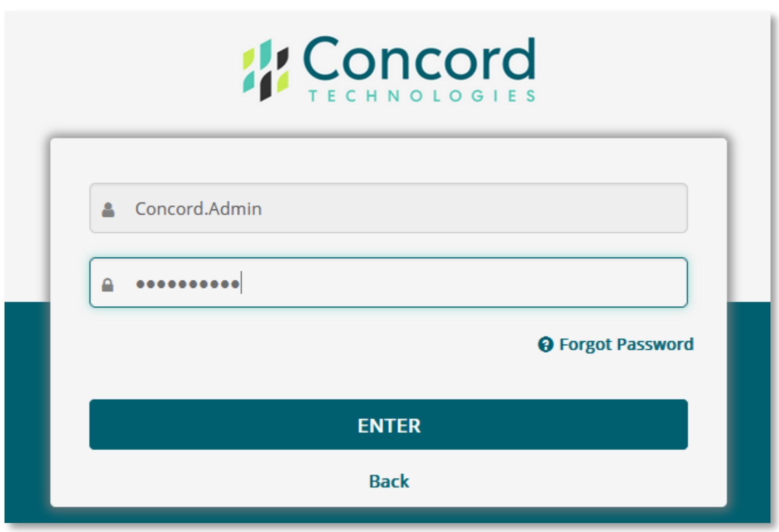
Login steps may vary according to whether or not your organization is **Federated** with Concord for access via an external **Identity Provider**. The below steps represent the standard/non-Federated login process using **username** and **password**.   Please see Concord's [Federation Guides](#) for further information on integrating Concord with an external Identity Service Provider.

To access the **Cloud Fax Admin Portal**, navigate to **https://login.concord.net**.

You will first be prompted to enter your **Username**:



Click **NEXT** to proceed to enter your **Password**:

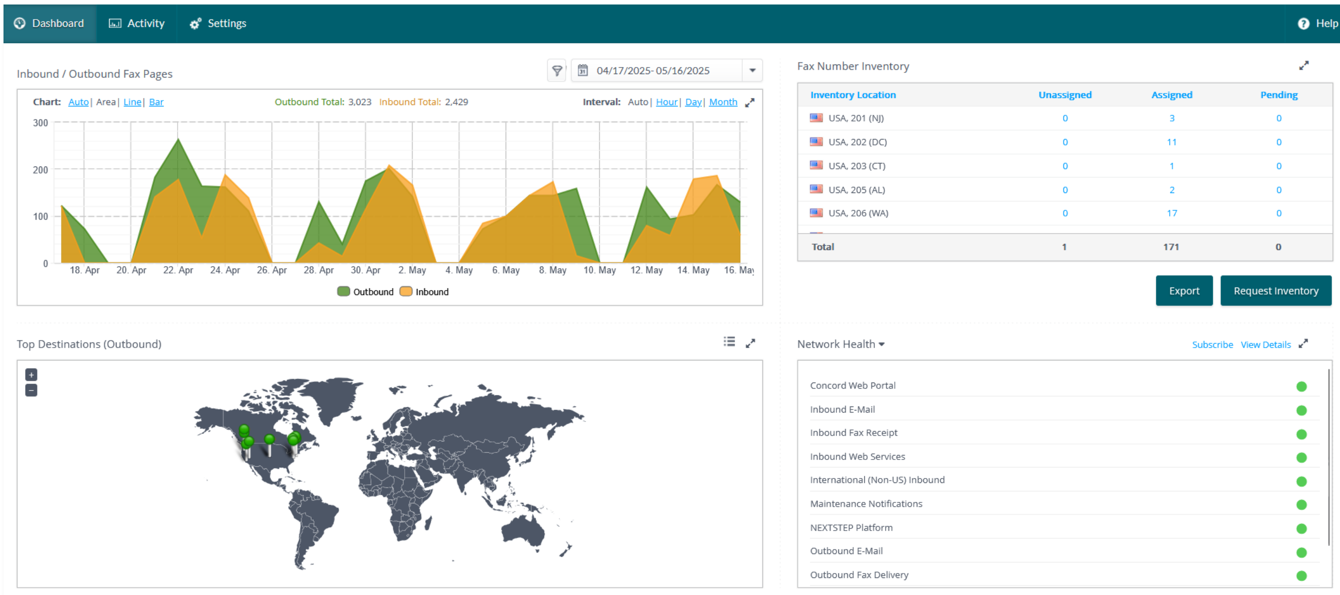


After entering your password, click **ENTER** to complete the login process**.**

If you do not know, or have forgotten your password, click on **Forgot Password** and follow the ensuing prompts to generate a password **reset email**.

The Dashboard

The home screen of the Concord Cloud Fax Admin Portal consists of a **Dashboard display** featuring several modules:



The specific items displayed **will vary** according to the **account level** and **access rights** of the logged-in admin.

A **Company-level** admin with full rights will see four modules:

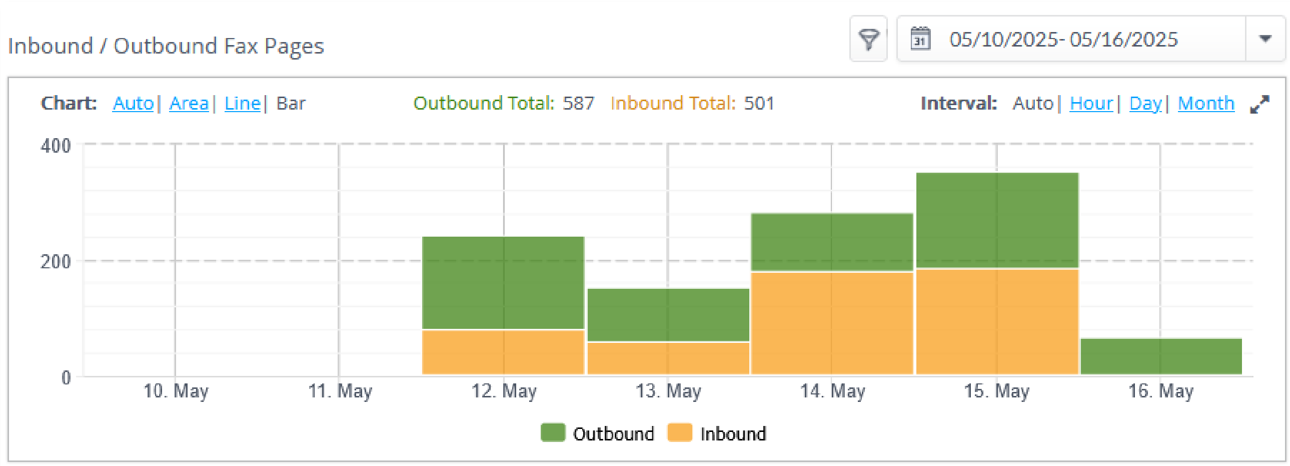
- Inbound Outbound Fax Pages
- Top Destinations (Outbound)
- Fax Number Inventory
- Network Health

Department-level admins will not see the **Fax Number Inventory** and cannot request new fax numbers directly from the Concord Cloud Fax Admin Portal. This function will need to be performed by a **Company-level** admin.

Inbound / Outbound Fax Pages

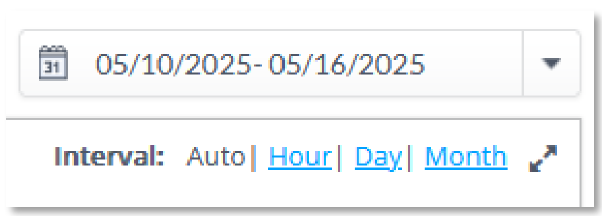
Beginning in the **top-left** corner of the Dashboard, the Inbound / Outbound Fax Pages report provides a short or long-term **summary** of fax page data for your account and the departments within. This report allows you to query for fax page counts for up to **two years**, depending on when the report is generated.

This report consists of inbound and outbound fax page data, displayed over time as an **area**, **line** or **bar graph**:

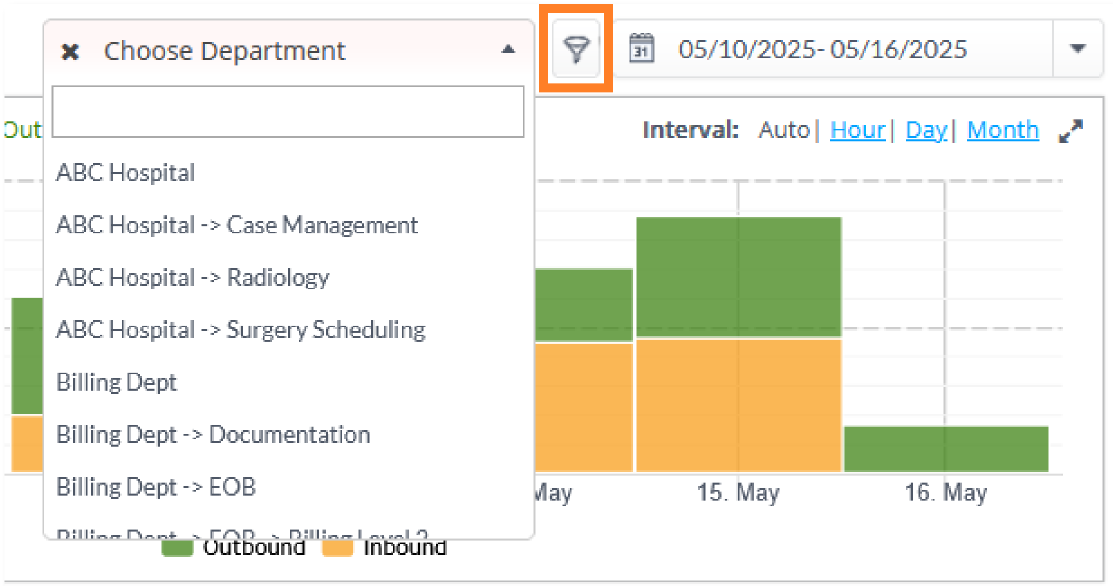


Outbound traffic is displayed in **green**; **inbound** traffic is displayed in **orange**. You can **select/deselect** to display either or both.

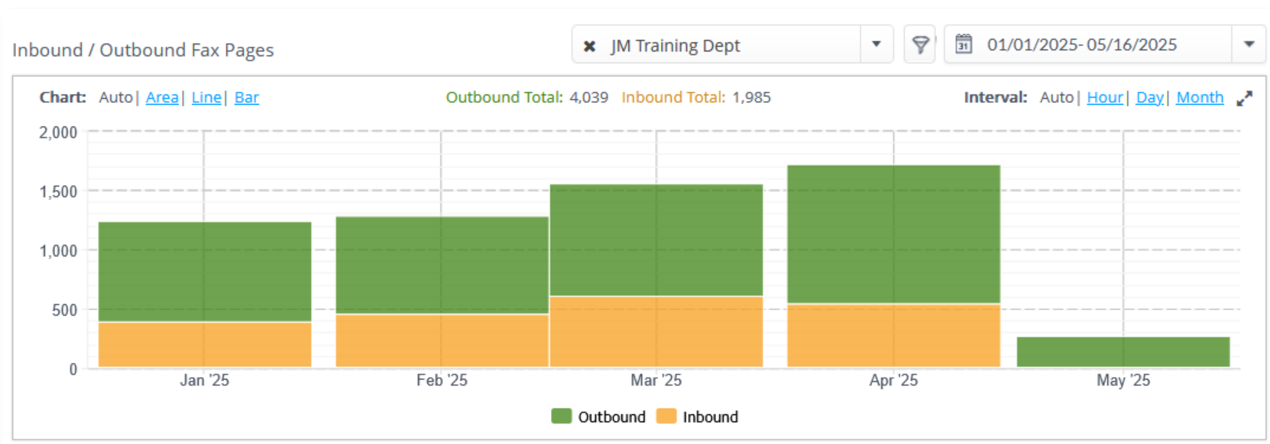
In the **top-right** of the panel, you can select a **date range** for your chart and the **time interval** you wish to see your results displayed in:



According to your admin account level and configuration, you may have the ability to select and view data for departments/sub-departments that exist in your account. Click the **Department filter** to choose from a list of existing departments:



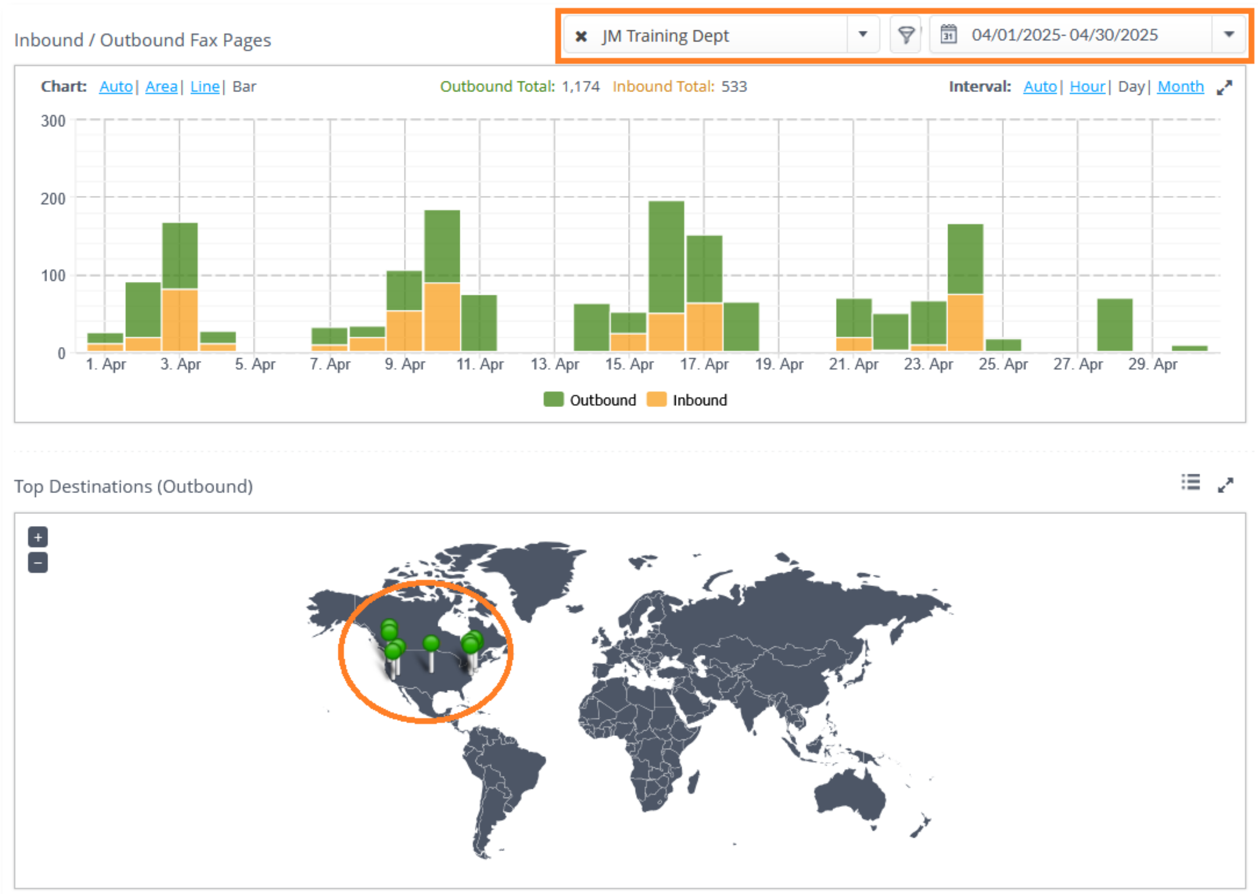
Selecting a **department/sub-department** will filter results to just that group's fax page totals:



Top Destinations (Outbound)

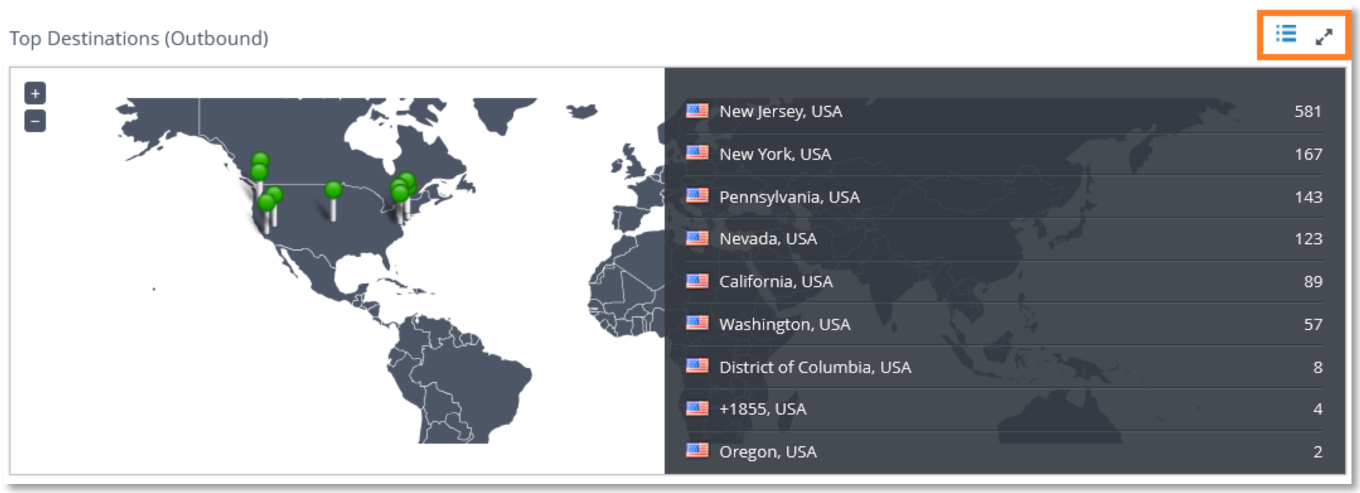
In the **lower-left** portion of the Dashboard, you will find a map of outbound fax destinations, based primarily on **State** for Domestic US fax traffic. International faxing will be displayed according to **Country**.

The same **Date/Time** and **Department** filters used for Inbound / Outbound fax page reporting may be used to filter the Top Destinations (outbound) as well:



Click **+/-** to zoom in or out.

Click the **Show Details** icon to list the **Top 10** destination areas your faxes are being sent to:



Click the **Expand** icon to enlarge the results.

Fax Number Inventory

In the **top-right** portion of the Dashboard, **Company-level** admins will see the **Fax Number Inventory.** This provides an overview of the fax numbers that have been provisioned to your account, typically listed according to **area code**. International locations may be displayed here, if you have **international** numbers in your account:

Fax Number Inventory

Inventory Location	Unassigned	Assigned	Pending
USA, 201 (NJ)	0	3	0
USA, 202 (DC)	0	11	0
USA, 203 (CT)	0	1	0
USA, 205 (AL)	0	2	0
USA, 206 (WA)	0	17	0
Total	**1**	**171**	**0**

Export | Request Inventory

Fax numbers in the inventory may be assigned to one of three **categories**:

- **Unassigned:** Unassigned numbers have been provisioned to your account but have not yet been **assigned** to a user account or Shared Queue. Unassigned numbers **cannot** receive faxes.
- **Assigned:** Assigned numbers have been provisioned to your account and assigned to a user account or Shared Queue. Assigned numbers **can** receive faxes.
- **Pending:** Numbers are **rarely** listed as Pending in the Fax Number Inventory. This is sometimes associated with fax numbers that are in the process of porting from another carrier to Concord. Pending numbers **cannot** receive faxes.

By clicking on any of the **area codes** associated with an Inventory Location**,** you can see a list of all numbers included in that location's **Fax Pool Details**. This is **information-only** and you cannot manage fax assignment from this section.

See below example of **Assigned** fax numbers for the **732 area-code**:

Fax Pool Details

Assigned

Market ID: 607

User Account	Fax Number	Status
Jay Patel - Fax Inbox (666068)	US +1 7327104531	In Use
NEXTSTEP Shared Queue New Inbound (817591)	US +1 7327900102	In Use
NEXTSTEP Shared Queue Fax Workflow (834931)	US +1 7327900104	In Use
John McFadden NS (813924)	US +1 7327900117	In Use
NEXTSTEP Shared Queue SocialServices (886062)	US +1 7327900125	In Use
John McFadden (813682)	US +1 7328538542	In Use
NEXTSTEP Shared Queue HCPlusOCR (943476)	US +1 7328538626	In Use
NEXTSTEP Shared Queue BarcodeJM (1013314)	US +1 7329649442	In Use

Only **Assigned** numbers will display associated **User Accounts,** as these are the only numbers in the Fax Number Inventory that will be actively associated with a user or Shared Queue.

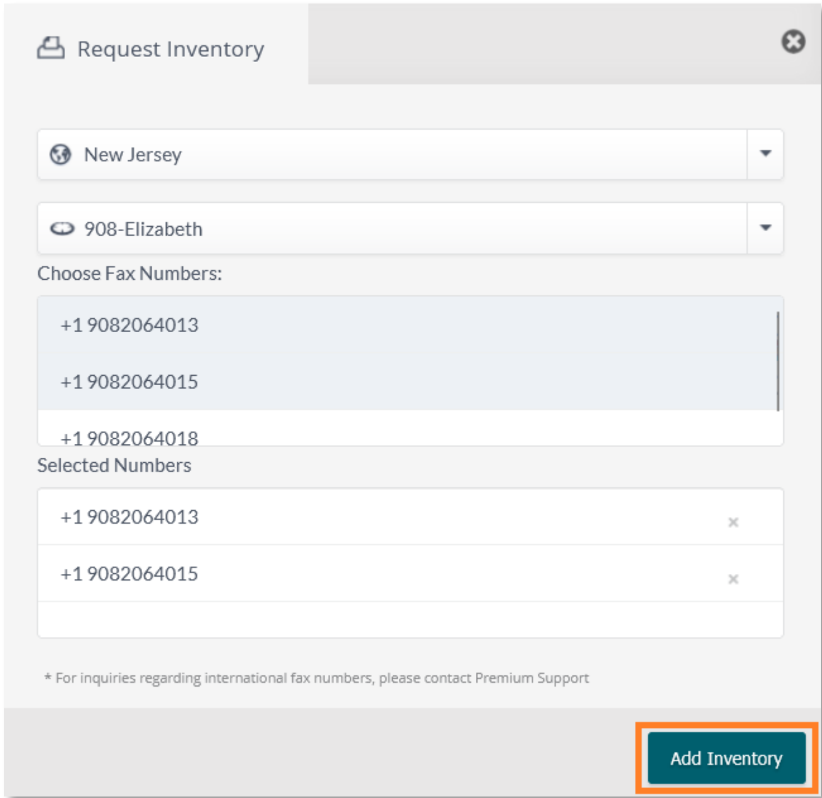
You can export your Fax Number Inventory by clicking the **Export** button. This will create a CSV file list of all of the numbers provisioned to your account, their **status** and whether they were **ported** to Concord or provisioned as new:

	A	B	C	D
1	Phone Number	Country Code	Phone Status	Ported Number
2	12012105047	US	In Use	FALSE
3	12014906332	US	In Use	FALSE
4	12018855197	US	In Use	FALSE
5	12025074704	US	In Use	FALSE
6	12025957825	US	In Use	FALSE
7	12025957834	US	In Use	FALSE
8	12025957835	US	In Use	FALSE
9	12025957838	US	In Use	FALSE
10	12025958202	US	In Use	FALSE
11	12025958203	US	In Use	FALSE
12	12025958204	US	In Use	FALSE

Adding Fax Number Inventory

A Concord **Company-level** administrator can order additional fax number inventory directly through the Cloud Fax Admin Portal. To obtain additional fax numbers, click **Request Inventory.**

This will open a **selection form** where you can choose numbers from **available geographies**:



By default, international locations will not appear, and you will see options for selecting from **domestic/US** states and area codes. If you require access to select **international** locations, please contact Concord Premium Support.

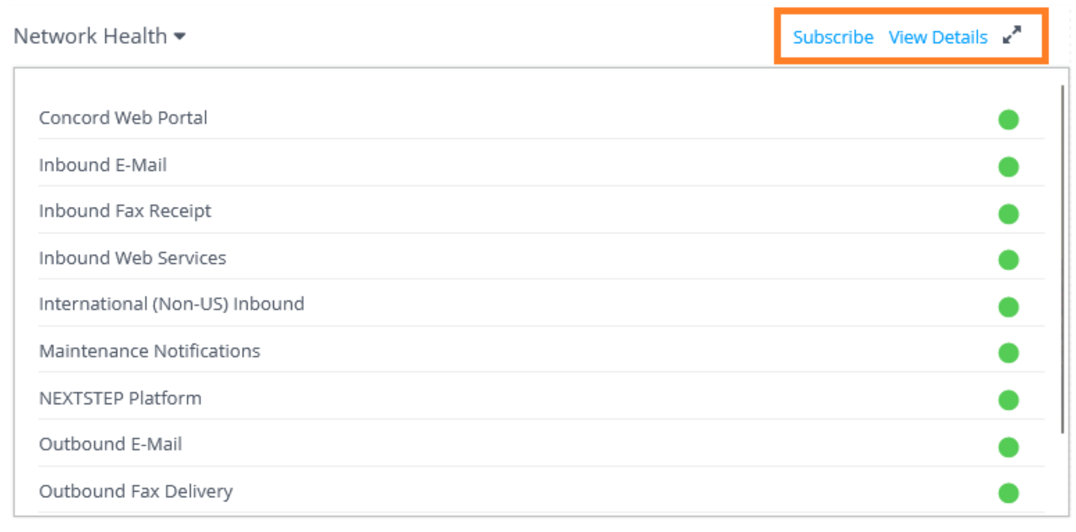
After you have selected the **State**, a list of available **area codes** will be displayed, often accompanied by the city associated with them.

Select the desired area code and city, and a list of available fax numbers will be displayed. Choose one or more fax numbers to add to your **Selected Numbers** and then click **Add Inventory** to add these as **Unassigned** numbers to your account.

Note that there may be a **Maximum Inventory Threshold** present on your account. If you exceed this limit, a warning message will be displayed. Your inventory threshold can be **increased or decreased** by **Concord Premium Support**.

Dashboard – Network Health

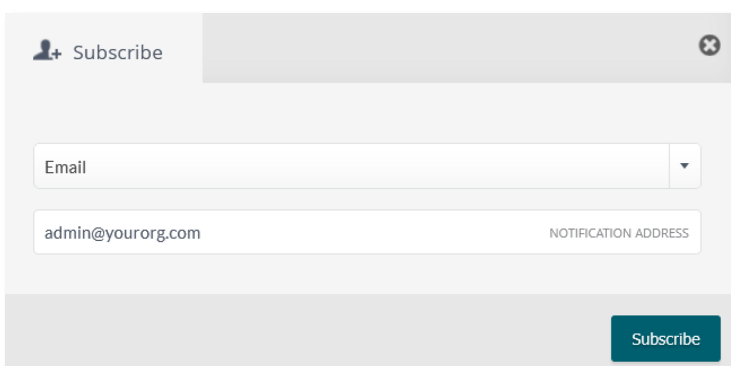
The **Network Health** panel, found in the **bottom right** corner of the Cloud Fax Admin Portal, provides both current and historic Concord **service status** as well as a **subscription** method to register for proactive notifications in the event of a service impacting event.



The Network Health panel will display the **current status** of Concord services according to the following **colors**:

- Green: Operational
- Yellow: Degraded
- Red: Interrupted

Click **View Details** to see a historical record of any incidents that were recorded in the Network Health panel. You can subscribe to receive **proactive email alerts** on the specific services you choose by clicking on **Subscribe**:

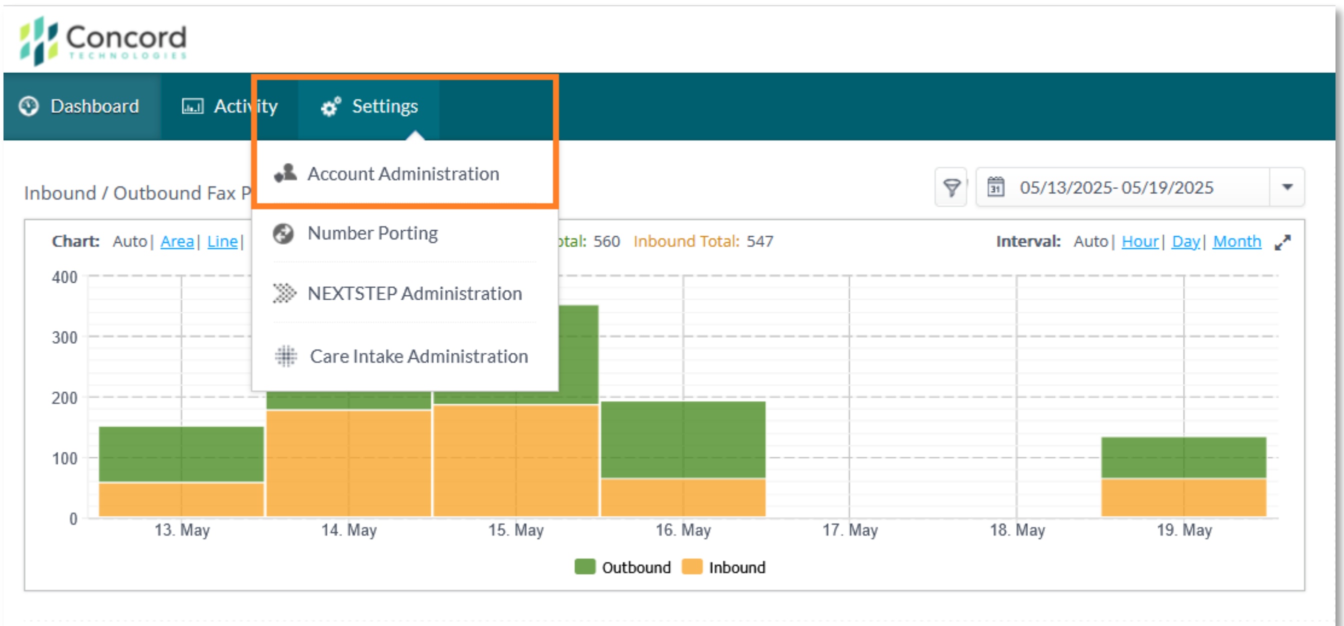


Your admin account email will show here by default, but **any email** may be entered. The email address entered will receive an email to **confirm subscription** and select services.

Settings and Account Hierarchy

The **Settings** button provides access to tools used to manage Cloud Fax **departments**, **admins** and **users** and may also provide links to additional Concord services beyond Cloud Fax, such as **NEXTSTEP** and **Care Intake**.

The admin site options listed below **Settings** are made available according to Concord **contracted services:**



Details for managing any additional Concord services listed may be found in other guides. For the purposes of this guide, we will be reviewing the **Cloud Fax** settings that can be accessed by clicking **Settings / Account Administration**.

This will open the **Account Hierarchy.**

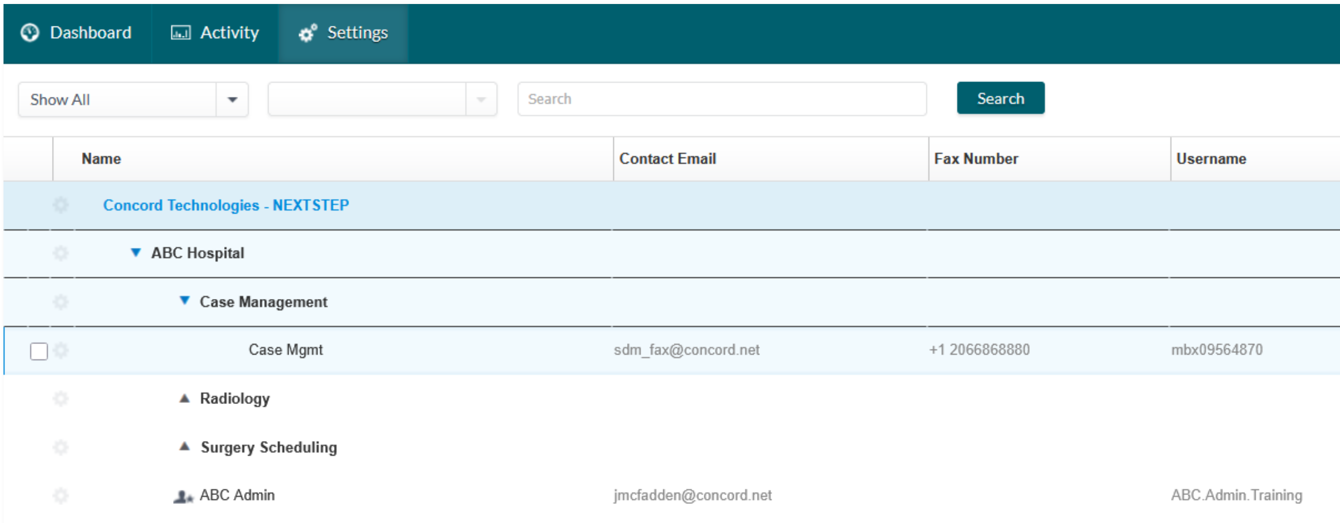
The basic structure of a Concord Cloud Fax account follows a hierarchical order of **Company / Department / User.**

The **Company** level sets the overall account **defaults** for fax-related behaviors and security requirements.

The **Department** level allows for the creation of **user groups** that may be configured with their own default behaviors, administrators and security. Departments may contain **sub-departments** for additional granularity, with several levels of nesting possible:

Company / Department / Sub-Dept Level 1 / Sub-Dept-Level 2 / Sub-Dept Level 3

Within the department **containers** are the users and, possibly, Shared Queues, that make up that department. Each user can be **configured individually** to utilize or depart from the default settings dictated by the Company and/or Department settings.



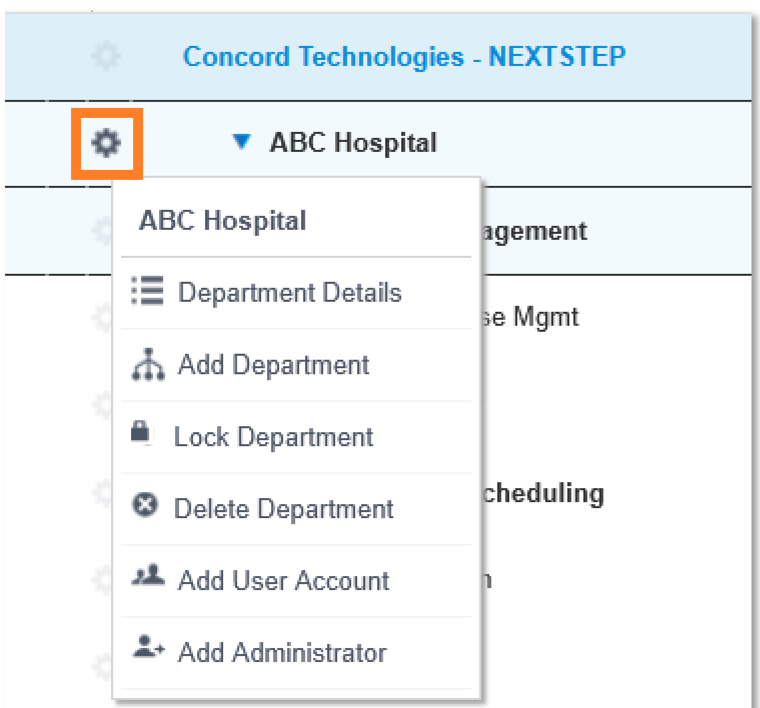
In the above example, **Concord Technologies - NEXTSTEP** is the name of the company and where you would find the **Company-level** settings.

Beneath the Company level, there is a single **department** available, **ABC Hospital.** The **ABC Admin** account exists at this level and has access to the **sub-departments** listed within/above.

Within the ABC Hospital department, there are three **sub-departments: Case Management**, **Radiology** and **Surgery Scheduling**.

The **Case Management** sub-department is open and there is one **user** visible there, **Case Mgmt**.

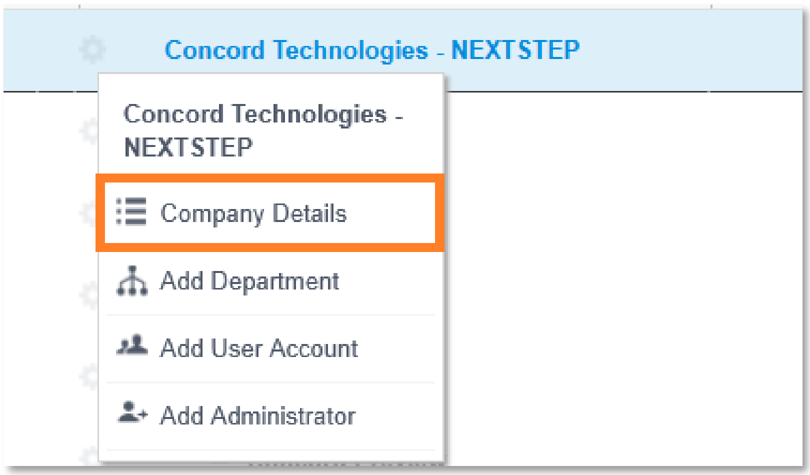
Options for each entity may be found by right clicking the **gear icon** next to each line item:



Company Settings

Upon account creation, **Company Settings** initially apply to the **entire organization** and create the baseline for many configuration settings. Several of these settings may be updated at the department or user levels. Certain settings remain applicable to the entire account.

Company Settings may be accessed by right clicking the **gear icon** next to your company/organization name and selecting **Company Details** or by double-clicking the **name** of your organization:



By default, Company Details contains a minimum of **seven** tabs:

- **Fax:** Baseline fax behavior settings
- **Coverpage:** Company-level coverpages and coverpage behaviors
- **Notifications:** Email-to-fax and new user 'welcome' notices
- **Custom:** Date/time and header/footer settings
- **Archive:** Optional Company-level archiving to email or SFTP
- **Security:** Password requirements and session security
- **Contacts:** Emergency account contacts

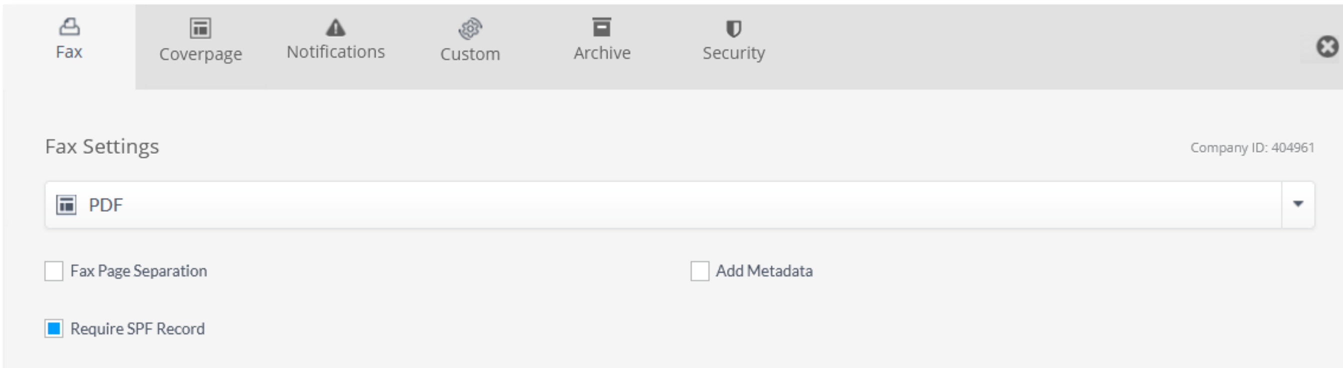
Additional tabs may be present depending on the configuration of your account:

- **Federation:** Optional configuration panel for editing Federation settings when leveraging an external Identity Provider for authentication to Concord. Federation settings and configuration options are available in Concord's Federation Guides.
- **OBO:** Optional configuration panel for editing settings related to Federating application authentication to Concord and manage security specifics to multiple applications. This will be detailed later in this guide.

Each tab contains settings that can be edited for your organization. Some tabs are applicable only to **Cloud Fax** and/or email-based use cases and **will not** apply to all Concord Cloud Fax services.

Fax Tab Settings

The **Fax** tab controls some of the baseline settings for **inbound** and **outbound** Cloud Fax handling. These may be edited to update default behaviors:



The file type drop-down dictates the format of the files that will be generated for **Inbound** faxes:

- **TIF** (.tif)
- **XPS** (.xps)
- **PDF** (.pdf; the system default)
- **TIF-HiRes** (.tif; high resolution)
- **TIF-Fax** (.fax; standard TIFF document with custom extension)

To change the default file type, **select** the desired file type and click **Save** on the top-left side of the menu bar.

Only **one** of the other three settings listed is typically enabled at the **company** level:

- **Require SPF Record:** This setting applies specifically to **outbound faxes sent via email**. When selected, Concord will check email senders' Sender Policy Framework records when any user sends a fax via email. This is a mechanism to prevent **spoofing** of services.

The two other settings listed are **rarely enabled** at the company level, but may be applicable for specific department or user accounts, depending on need:

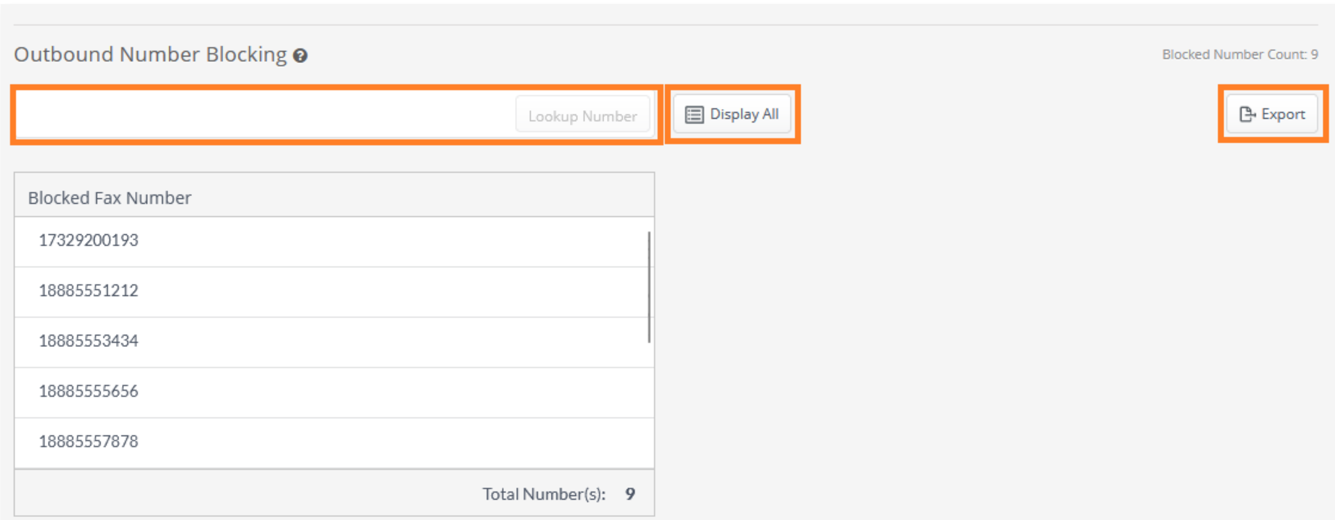
- **Fax Page Separation:** When enabled, multiple-page faxes received inbound will be separated into **single-page** files for each page received.
- **Add Metadata:** When enabled, this setting adds a metadata file, typically **XML**, to the fax document handoff between Concord and customer, as **inbound faxes** are received and transferred.

Note that any saved changes made to the Company Settings are only **applied** to users created **after** the changes have been made. Changing behaviors at Company level **will not** push changes to users automatically. To push saved changes from the company level to the departments and users beneath, please contact **Concord Premium Support**.

Outbound Number Blocking

The Fax tab may also display **Outbound Number Blocking**, depending on **admin rights**. This module allows an admin to manage a list of numbers that users in their account **cannot** send faxes to. If a user attempts to send a fax to one of these numbers, they will receive an error indicating the number is **Blocked**.

Note that admin rights will also dictate whether the list is **read-only** or if an admin can edit the contents of the list:

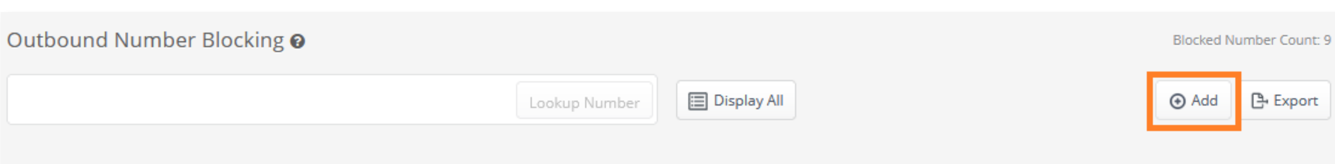


The above example represents an admin with **read-only** access.

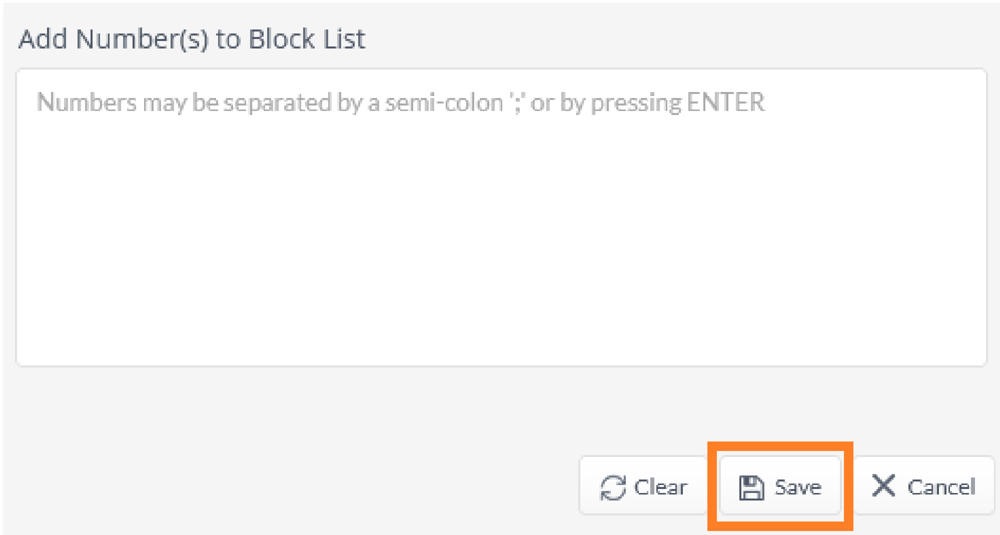
Click **Display All** to see a list of your blocked numbers or search via **Lookup Number** as needed.

To **download** the content of your blocked numbers list, click **Export**.

Admins with the rights to **edit** the blocked numbers list will see the option to **Add** numbers:



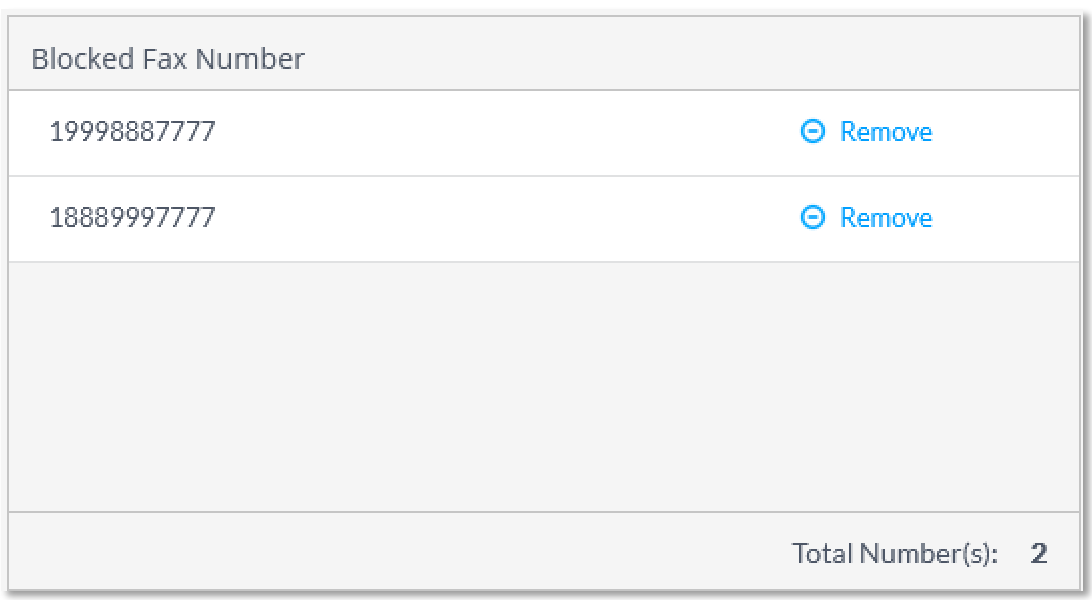
Clicking here will open a window to add **new numbers** to the blocked list:



Type or **paste** numbers into the window, separating numbers by **semi-colon** or by pressing **Enter.**

When you have entered all numbers, click **Save**.

Recently blocked numbers will be displayed with the option to **Remove**:



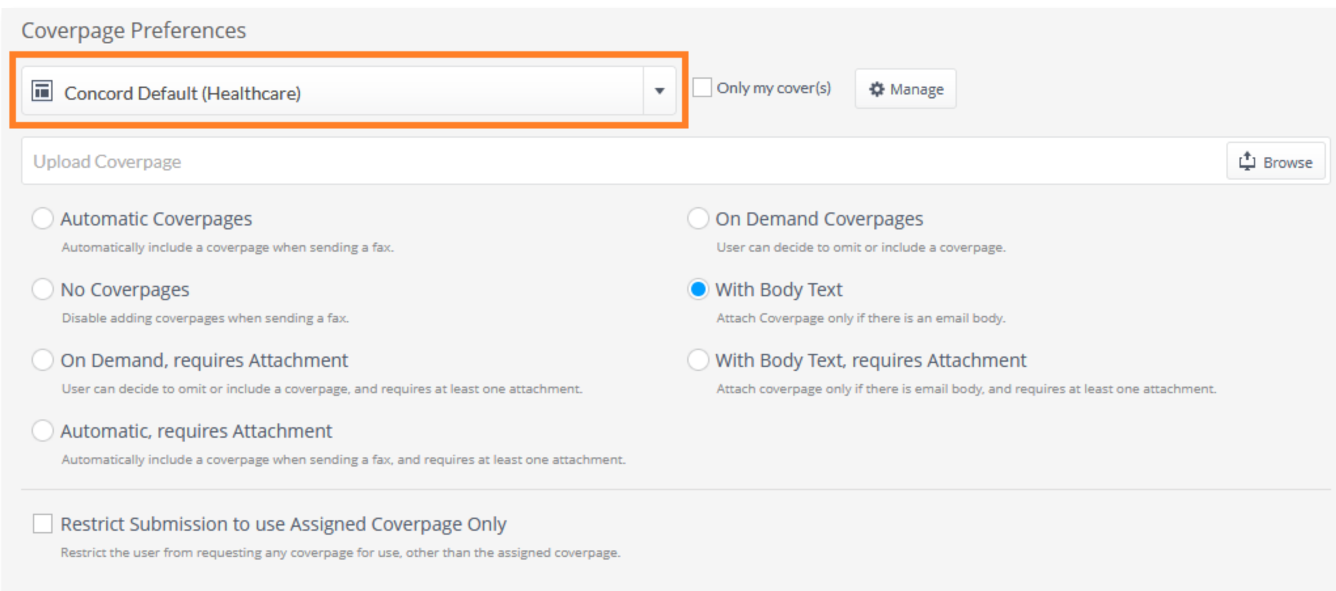
Coverpage Tab Settings

The Coverpage Tab provides access to **upload** and **edit** Company-level coverpage templates and manage the settings that dictate default coverpage **behavior** for your account. As with other settings, you may choose to upload and/or edit cover pages at the **lower** department or user levels, once you establish the base account template and setting **defaults**.

This section will provide an **overview** of Coverpage Tab Settings and basic steps to upload a new coverpage template. For additional details and a list of supported **Coverpage Tokens**, please see the Concord [Cloud Fax Coverpage Guide](#).

Coverpage Preferences

The Coverpage tab displays the current default coverpage **template**, the **conditions** for including a coverpage in outbound faxes, and the potential for **restricting** coverpage use:



The **top-left** drop-down allows you to select the **default** Company-level coverpage template. There are two generic options provided, **Concord Default** and **Concord Default (Healthcare).** The latter contains a HIPAA-oriented confidentiality statement. As new coverpages are created at the Company level, they will become **selectable** in the drop-down menu.

To select a new **default** coverpage, choose the desired coverpage from the drop-down menu and click **Save** in the **top-left** of the menu bar.

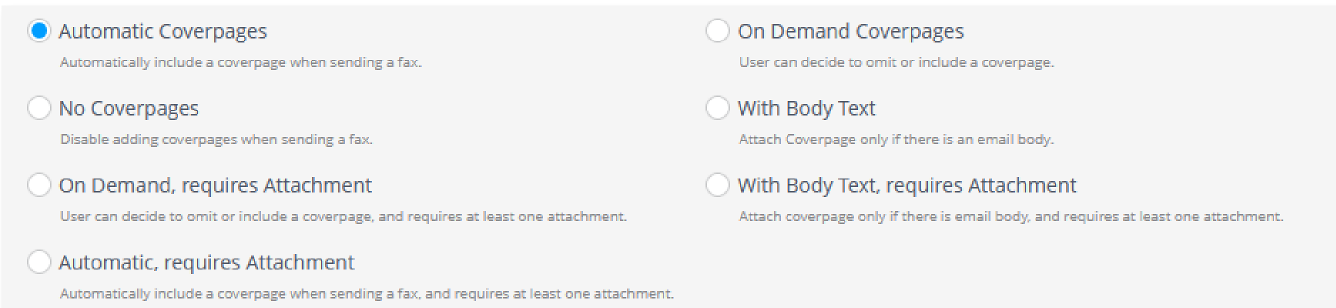
Additional details on **creating** and **managing** coverpages, including full list of **tokens** may be found in please see the **Concord Cloud Fax Coverpage Guide**.

To filter coverpages to only those coverpages directly owned by the hierarchical level, select the option, **Only my cover(s)**.

Selecting **Manage** allows you manage coverpages uploaded to and owned by the Company level. Via Manage you can **download**, **rename**, **replace** or **delete** a Company-level coverpage.

Note that you cannot manage or edit the **Concord Default** and **Concord Default (Healthcare**) coverpages.

Below the coverpage template is the selection for **default coverpage behavior**, including the **conditions** required to be met to add a coverpage to an outbound fax:

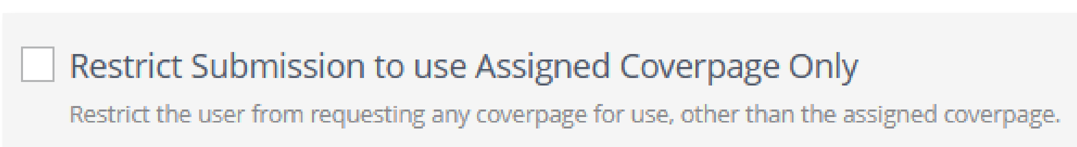


One of the following may be set as your Coverpage **default behavior**:

- **Automatic Coverpages** enables forced coverpages on outbound faxes with no restriction.
- **No Coverpages** disables the use of coverpages by default.
- **On Demand Coverpages** give the user the option of including a coverpage or disabling the coverpage when they send a fax.
- **With Body Text** is oriented specifically towards users who will be submitting faxes via **email**. The inclusion of email body text when submitting a fax via email is the trigger to enable a coverpage.

The settings that **Require Attachment** are also relevant to users that will be submitting faxes via email. Requiring attachment would **prevent** users from sending a **coverpage only** when sending an outbound fax. Users will need to include at least one attachment whenever they send a fax via email to avoid **rejection**.

Below this, you will find the option to **Restrict Submission to Use Assigned Coverpage Only**:



Checking this box will restrict user accounts so they **will not** be able to select any coverpages beyond the default they are specifically assigned. Coversheet selection in applicable Concord applications will be **disabled**.

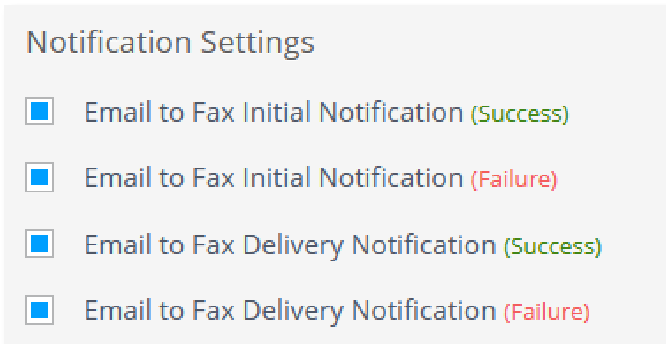
Note that while these settings will dictate the **company defaults**, Concord Administrators with the appropriate rights will have the ability to edit these settings and/or create new cover page templates at **department** and user **levels**.

Notifications Tab Settings

The Notifications tab is split into **two sections** pertaining to **email notifications**:

Email-to-Fax Notifications

The **top** section pertains specifically to users who **send faxes via email** and dictates the notifications that will be sent back to the user in response to their email-to-fax submission:



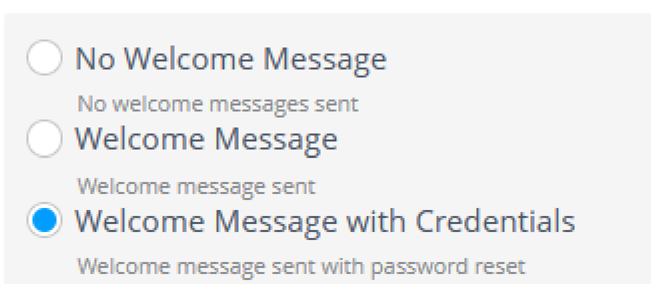
The **Email to Fax Initial Notification (Success or Failure)** is generated upon **submission** to notify the sender if their submission was successful or failed due to an issue with the submission, such as an invalid fax number or unsupported document type attachment.

The **Email to Fax Delivery Notification (Success or Failure)** is generated following **successful** fax delivery or a delivery **failure,** after Concord has made multiple retry attempts at delivery.

It is recommended that **all** notifications are left enabled, but the **failure** notifications should be enabled at **minimum,** so users are notified if fax submissions or fax deliveries fail.

Welcome Messages

The **bottom** section of the Notifications tab sets the default **Welcome Message** type, which will be selected when an admin sends a Welcome Message from within a **user** account:



Note that Welcome Messages are **not** generated automatically on user creation. The settings here govern the default that would be selected when an administrator **manually** accesses the Notification section of a user account to send that user a Welcome Message.

There are **three options** available as the default Welcome Message setting:

- **No Welcome Message:** No message is the default Welcome Message notification behavior selected when accessing a user.
- **Welcome Message:** A Welcome Message would be sent containing general account information such as fax number but no information regarding authentication or password reset.
- **Welcome Message with Credentials:** A Welcome Message would be sent containing general account information as well as instructions for resetting the user's password to authenticate to Concord services.

If you modify any of the default notifications provided, remember to click **Save** in the top-left of the menu bar.

Remember also that any **saved changes** made to the **Company Settings** are only applied to users created **after** the changes have been made. Changing behaviors at Company level **will not** push changes to users automatically.

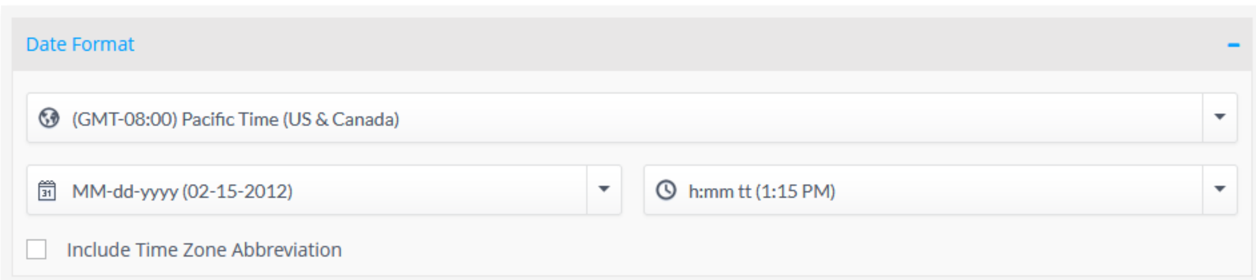
To push saved changes from the company level to the departments and users beneath, please contact **Concord Premium Support**.

Custom Tab (Date/Time & Header/Footer) Settings

The **Custom Tab** will present the ability to access **Date/Time** settings by default. This tab also allows for access to manage **Header** and **Footer** settings, if these are **enabled** on your account and you have the proper **admin rights** to edit.

Date Format

The **top** section of the Custom tab contains settings pertaining to **date** and **time** and how this will be depicted in timestamps related to inbound and outbound faxing. At **Company** level, these settings will form the basis for the **time-zone** that faxes will be sent or received in:



The **top** drop-down menu designates the T**ime Zone** associated with the **Company** hierarchical level.
The **bottom-left** drop-down menu designates the **Month/Day/Year** format. An example of the format is displayed after each option.

The **bottom-right** drop-down menu designates the **Hour/Minute** format. An example of the format is displayed after each option.

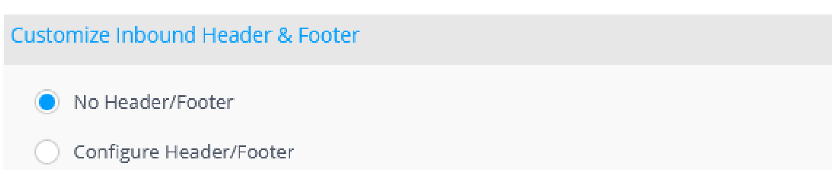
You may also opt to include the **Time Zone Abbreviation** as part of the Date/Time string added to fax notification metadata.

To save **changes** to the default date and time formatting settings, click **Save** in the top-left of the menu bar. Settings will cascade down to form the **default** for departments and users but can be **edited** at those levels.

Customize Inbound Header & Footer

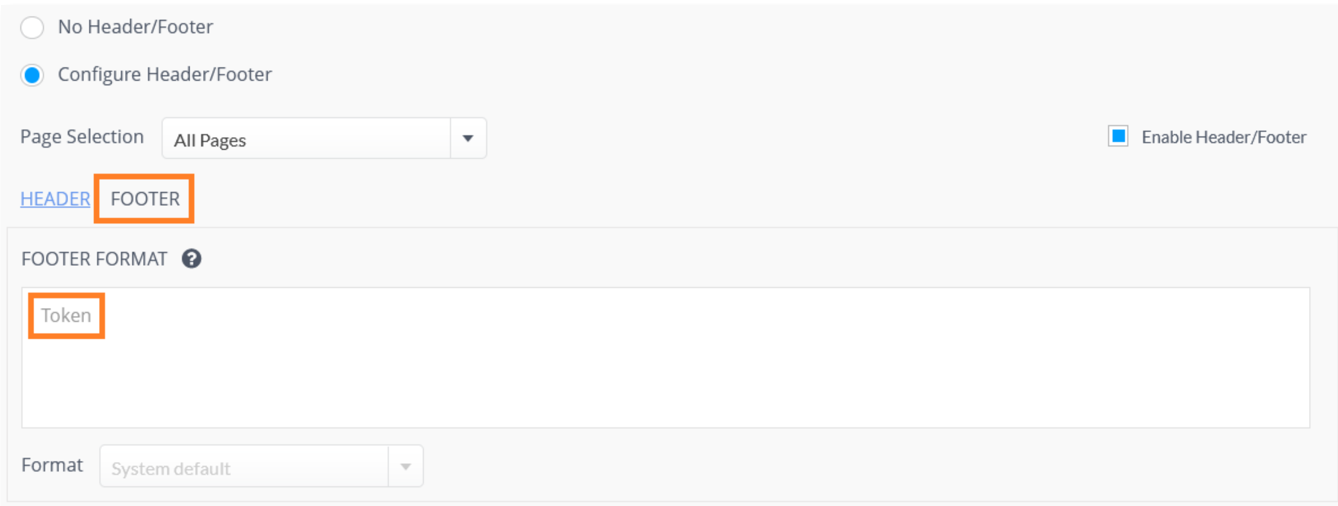
The **bottom** section of the Custom tab contains settings that allow you to add and/or edit custom header and/or footer **stamps** to your inbound faxes as they are received and processed by Concord. This setting is often **disabled** by default, and you may need to contact Concord Premium Support to enable this to configure.

As you open this section, if **nothing** has been configured yet, the default will show **No Header/Footer**:



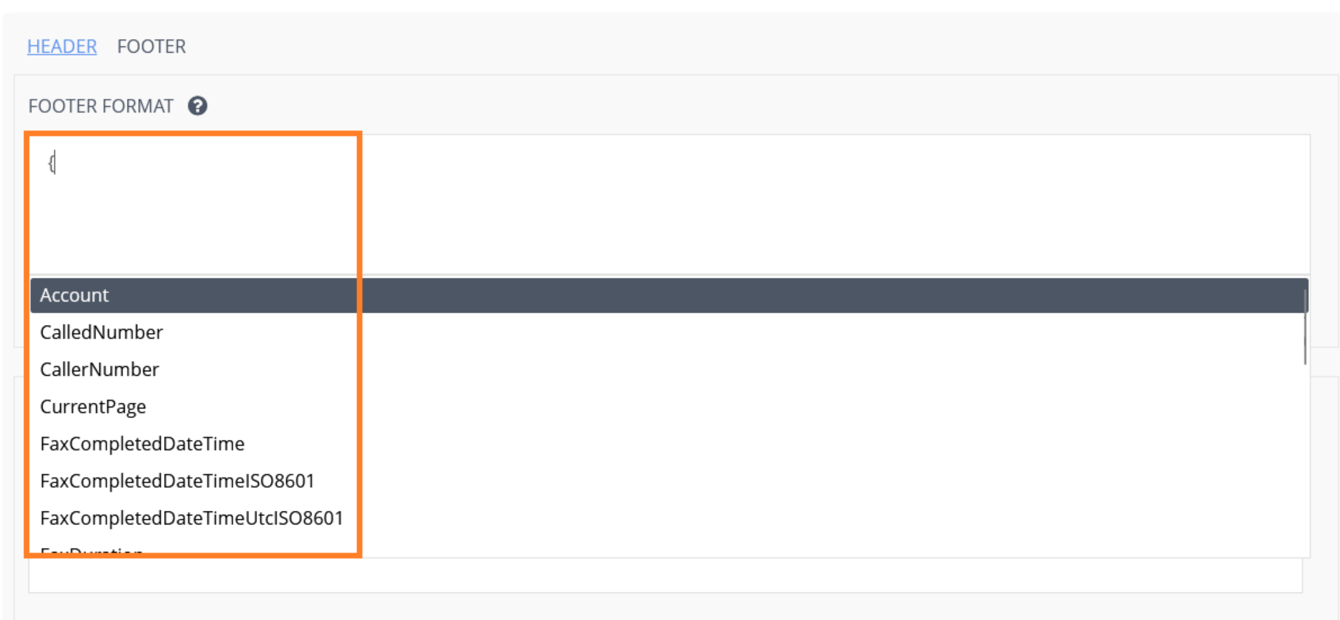
For the purposes of this document, we will be documenting the steps to add a **Footer**. Footers are more commonly added to inbound faxes as Headers **may overwrite** the original fax sender's own header, which often needs to be preserved.

To begin, click **Configure Header / Footer**:

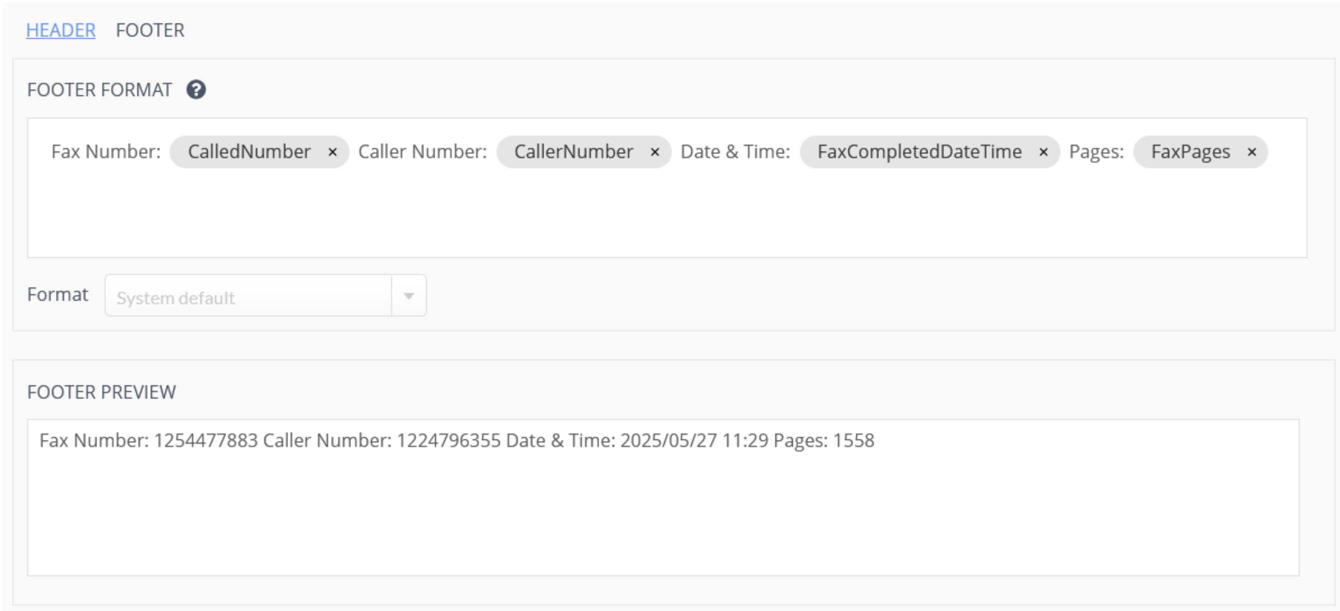


Click **Footer** to create and apply a Footer to all **incoming** fax documents.
Page Selection allows for the application of the footer to all pages of your inbound fax documents or only the first page.

In the Header Format window, you will see the text indicator **Token**. You can begin to configure a Footer by typing the character "**{**" to reveal the token options:



Select the **tokens** for data inclusion in your Footer. You may also include your own text as **labels** for the data that will be written to the token:



As you add **text** and **tokens** to the Footer Format, you will see a preview of your Footer with dummy data in the **Footer Preview**.

The footer will only be enabled following configuration by checking **Enable Header/Footer**.

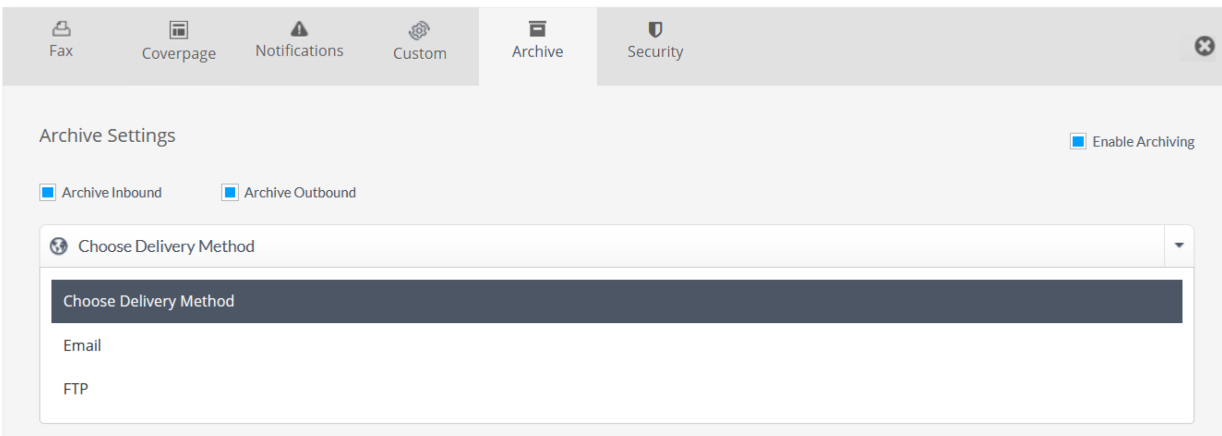
To save the format and add the Footer to your inbound faxes, click **Save** in the top-left of the menu bar.

Archive Tab

The **Archive Tab** offers Concord Cloud Fax customers the option of having all **inbound** and/or **outbound** faxes sent to a centralized **email** address or **SFTP** site. When configured here, archive settings are applied account-wide, and **all** inbound and/or outbound faxes would be archived accordingly.

Concord also offers similar archiving at the **department** and **user** level. For additional information on this, please contact **Concord Premium Support.**

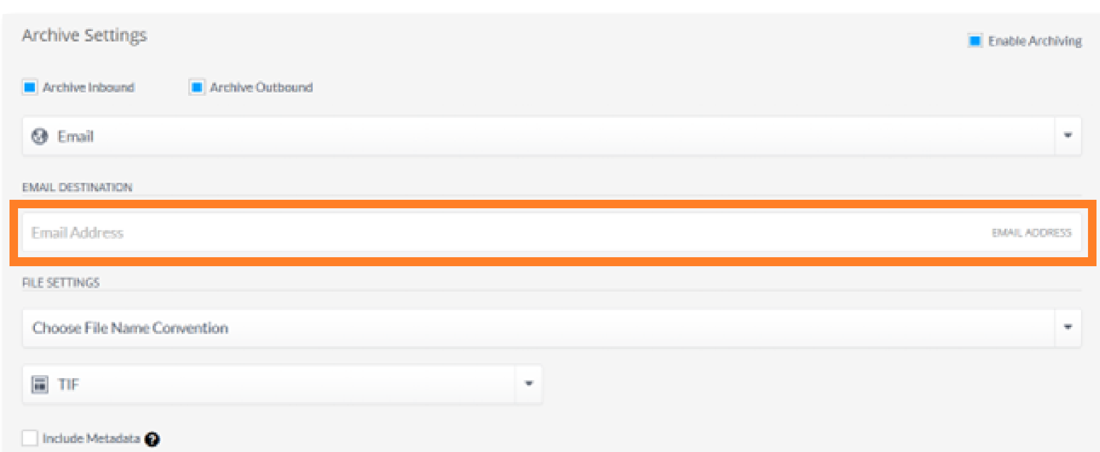
Archiving is always disabled by default. Click **Enable Archiving** to view and edit archive settings:



Once archiving is enabled you can select whether you want to archive **Inbound** faxes, **Outbound** faxes or **both**.

Next you must select a **Delivery Method**. Your selection will expose the additional configuration settings required for **each option**.

Email Archiving:

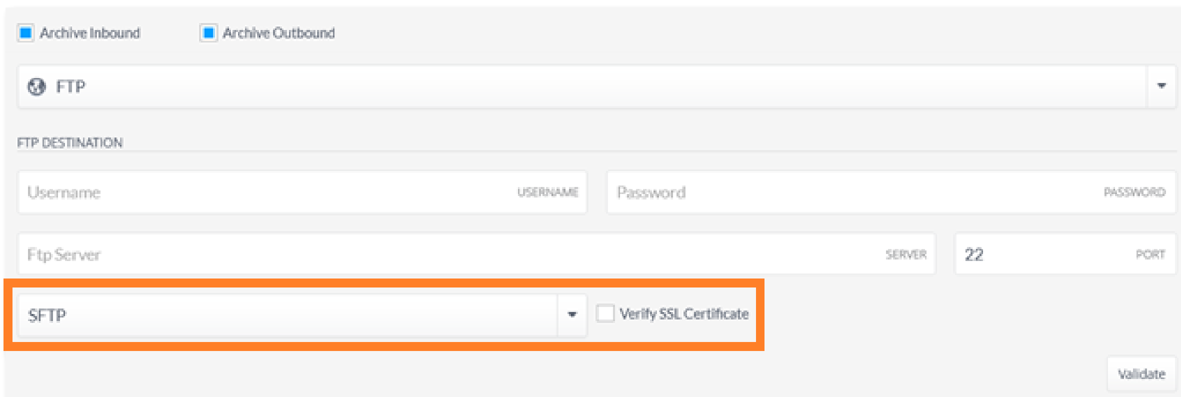


When configuring email you must include an **Email Destination** address.

You may choose the **File Name Convention** and **document type** for your archive attachments.

If you opt to **Include Metadata**, an additional attachment will be added to your archive email, containing fax transmission **metadata** in a structured format.

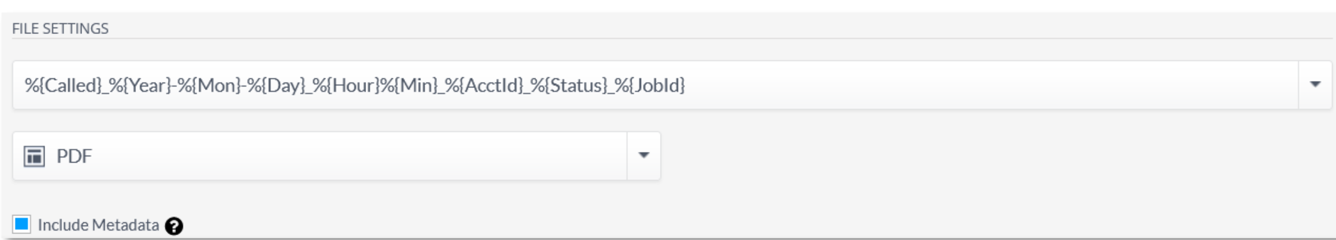
SFTP Archiving:



Although standard FTP is supported it is **not recommended**. Concord supports multiple methods of **secure FTP** which may be configured from this screen.

Enter the relevant details for your SFTP site, including **server URL**, **encryption method** and authentication **credentials.**

You have options for setting the **File Name Convention** and **document type** of the archive file and may elect to include a **metadata** file that will be uploaded to your SFTP site along with a copy of the inbound fax. This metadata file will contain **fax transmission details** pertaining to the archived fax:



Archiving will only be enabled following configuration by checking **Enable Archiving**.

To save settings and enable archiving for inbound and/or outbound faxes, remember to **Save** changes.

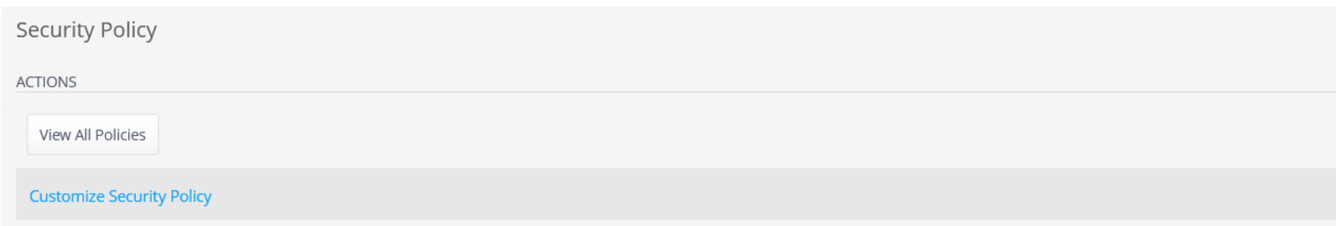
Security Tab

The **Security** tab allows an administrator to configure requirements and limitations related to **authentication** and **session** management. At the Company level, the Security tab defines **password requirements** for the entire organization. Note that this tab exists at **every level** of the Concord account hierarchy and admins can establish overriding Security Policies at other levels if needed.

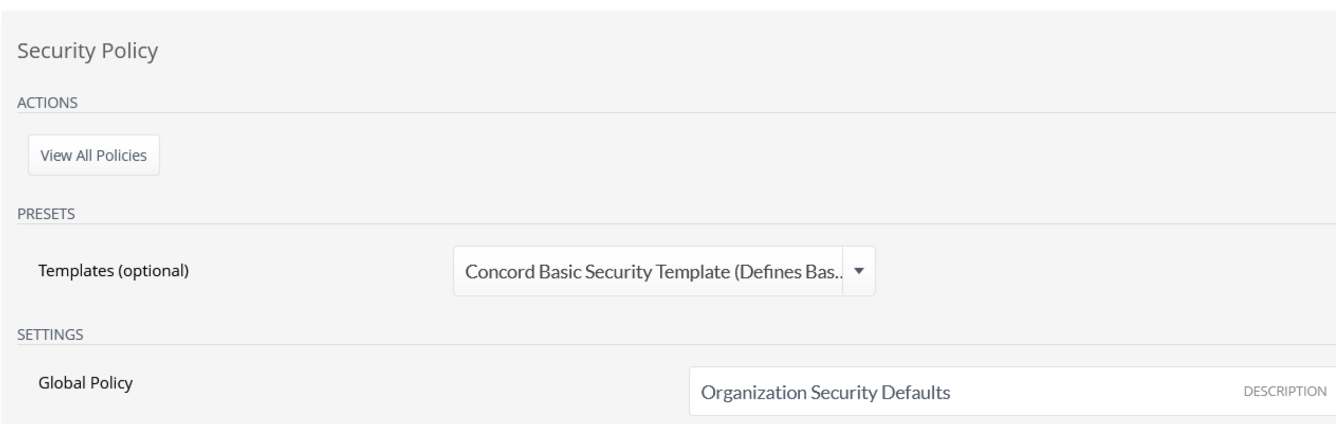
As the Security Tab is opened, you may scroll to **view** the current defaults in place or **edit** the settings.

To **view** any other existing Security Policies on your account, click **View All Policies**.

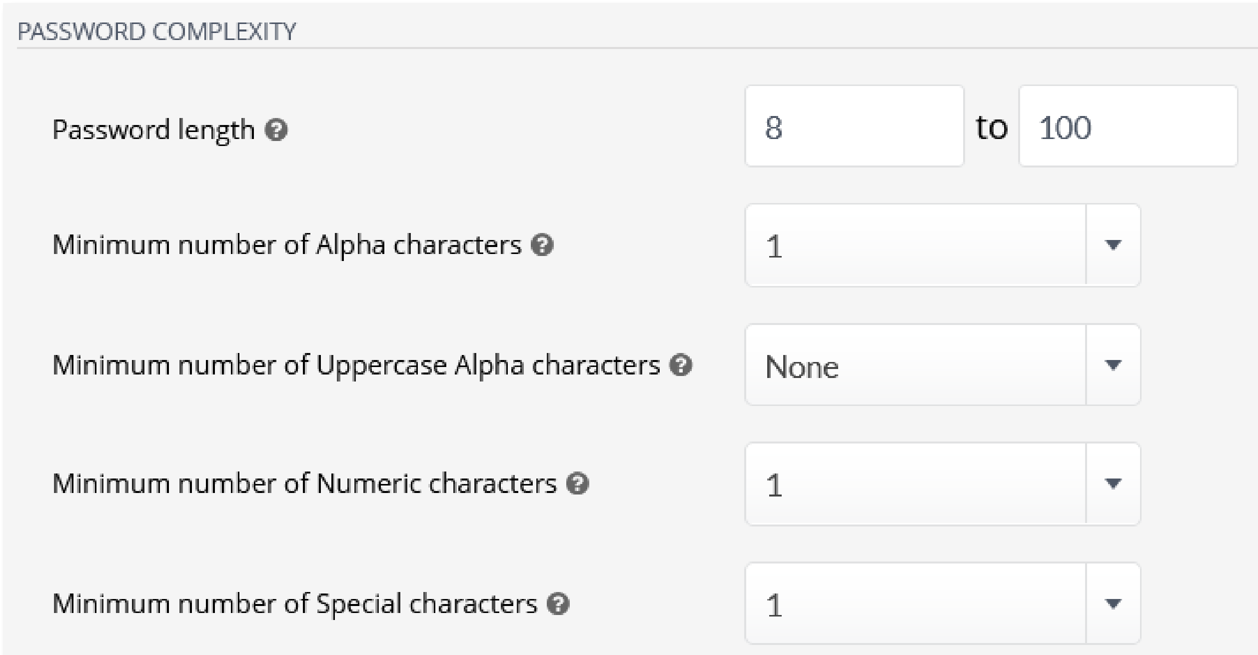
To **edit** the Company-level Security Policy, click **Customize Security Policy**:



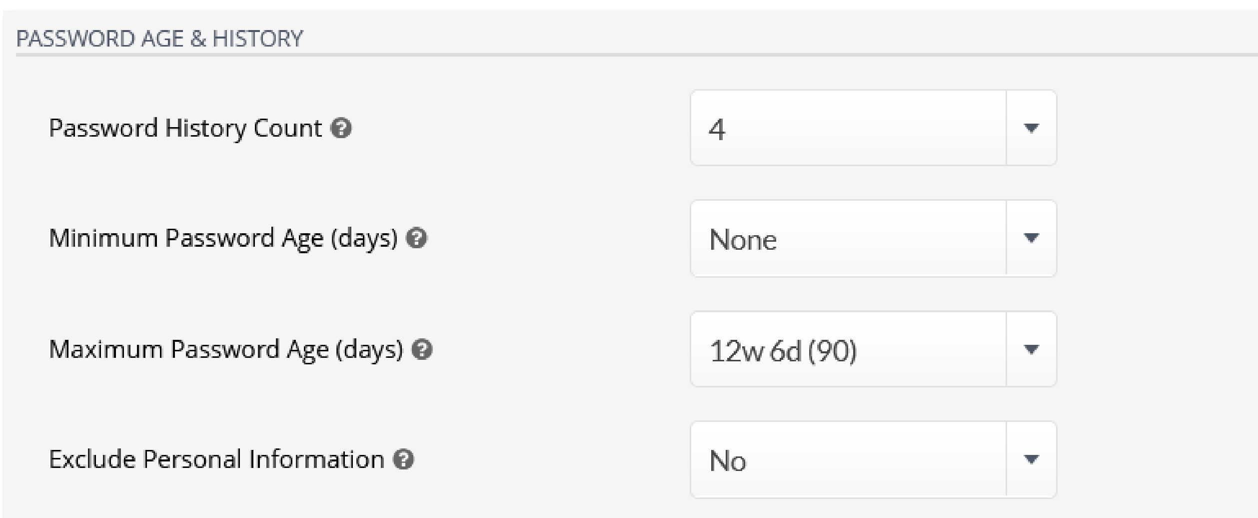
When editing the Security Policy, you have the option of loading optional **Templates** provided by Concord to set **initial values**:



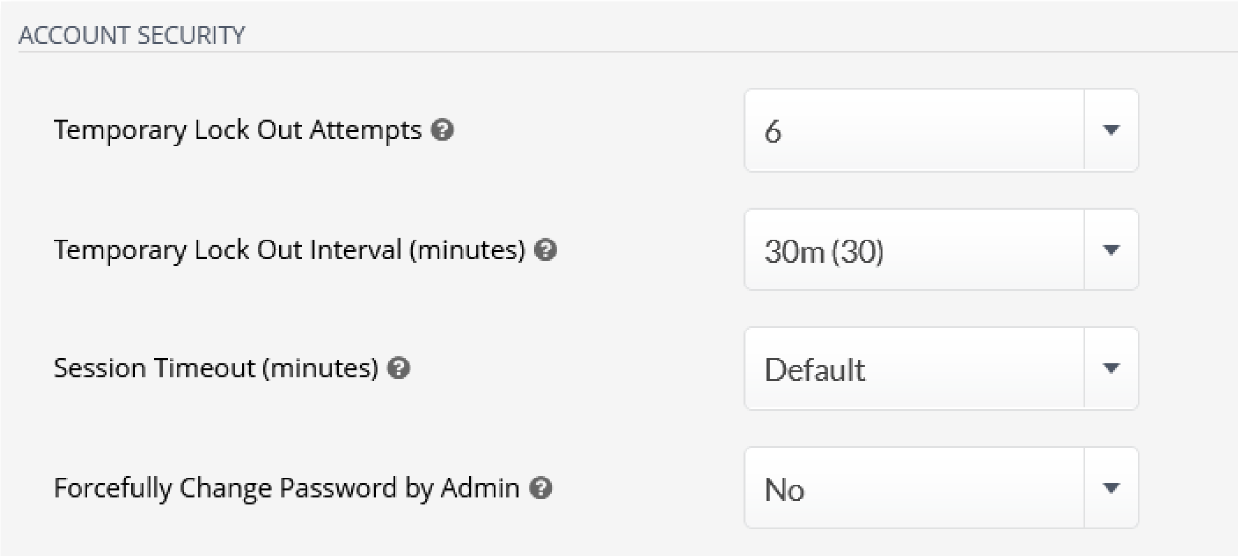
Select your template as needed and you can then proceed to edit settings individually, beginning with **Password Complexity** and the requirements that will need to be met when users are setting/resetting their password:



Next you may edit the **Password Age and History** settings, which dictates whether users must reset their password after a period of time and whether passwords can be reused:



Lastly are the **Account Security** settings, which govern behaviors related to user session timeout and lockout following failed authentication attempts:

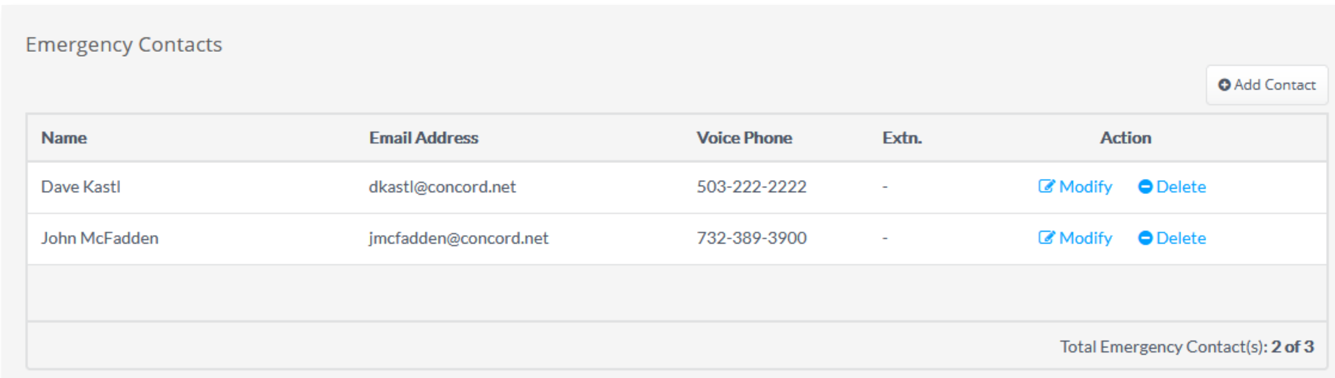


When all settings have been entered, click **Create Policy** to save changes.

Contacts Tab

The **Contacts** tab allows an administrator to maintain a list of up to **three** Emergency Contacts that may be used by Concord in the event of an issue that requires Customer-specific outreach, typically via **Concord Premium Support**. This tab will often be **pre-populated** with at least one contact, collected during **implementation**.

Admins have the option of **editing** contacts or **adding** new contacts to complete the Emergency Contacts list:



Emergency Contacts

Add Contact

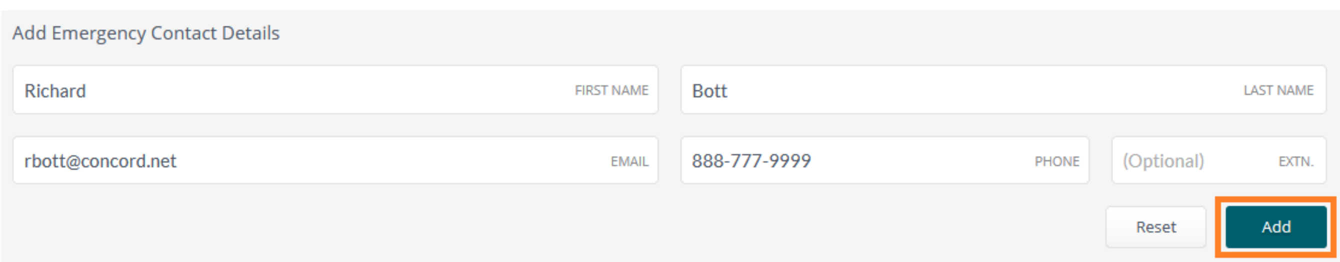
Name	Email Address	Voice Phone	Extn.	Action
Dave Kastl	dkastl@concord.net	503-222-2222	-	Modify Delete
John McFadden	jmcfadden@concord.net	732-389-3900	-	Modify Delete

Total Emergency Contact(s): **2 of 3**

To edit a contact, click **Modify**

To remove a contact, click **Delete**

To create a new contact click **Add Contact** and enter the available contact information:



When ready, click **Add** to create the contact.

Apps Tab (Optional Workflow Identity Management)

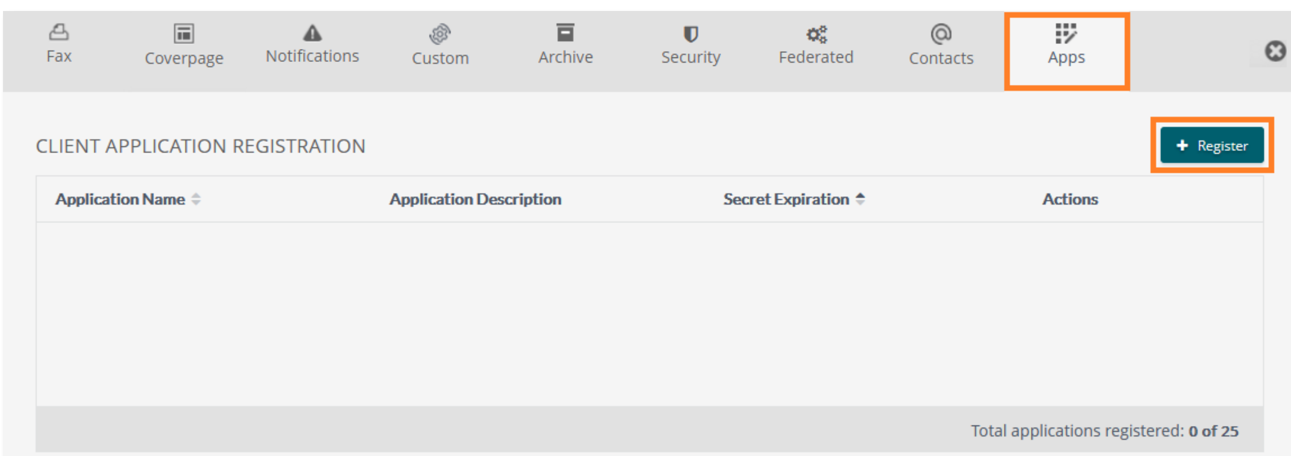
The Apps tab may be added to your administrative tab set as needed to allow for **Workflow Identity Management** on configured accounts. Workflow Identity Management is used to **authenticate** integrated applications via a third-party **Identity Provider** and avoid the use of standard user/password authentication when making programmatic API calls to Concord.

Workflow Identity Management may be applied to both Cloud Fax **User** and **Admin** accounts. Cloud Fax User accounts may be leveraged to access Concord APIs for sending (**Fax Web Services**) and receiving (**Inbound Web Services**) fax documents. Cloud Fax Admin accounts may be used to call APIs for account management and reporting (**Account Management Web Services**) and NEXTSTEP Share Queue management (**NEXSTEP Queue Management Web Services**).

The Apps tab is used for **registering** applications and connecting authentication details to the Concord accounts that will be used to make user or admin-oriented API calls. The user and/or admin accounts that will be used should be created **prior** to accessing the Apps tab to register them.

Additional configuration will be required within a Concord customer's Identity Provider application to properly account for user authentication and supply the details **required** to complete registration.

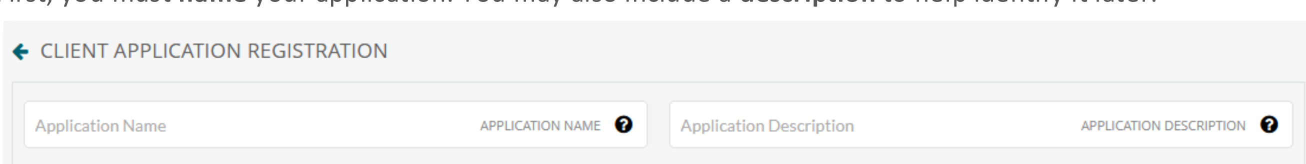
When ready, navigate to the **Apps** tab:



When this is first accessed, there will be no registered applications. A default maximum of **25 applications** may be imposed on your account. This can be lifted to a platform maximum of **60 applications** that may be registered for Workflow Identity Management.

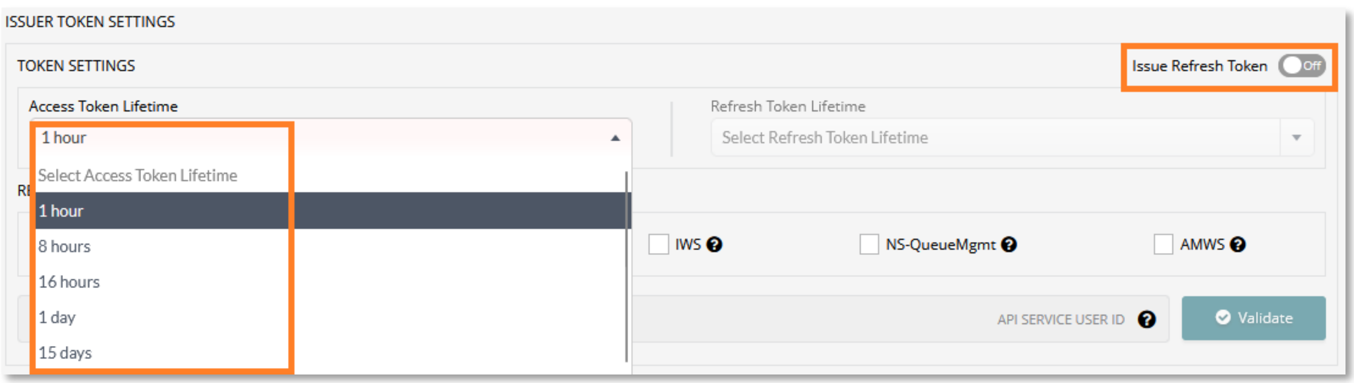
Click **Register** to begin the process of registering your application.

First, you must **name** your application. You may also include a **description** to help identify it later:



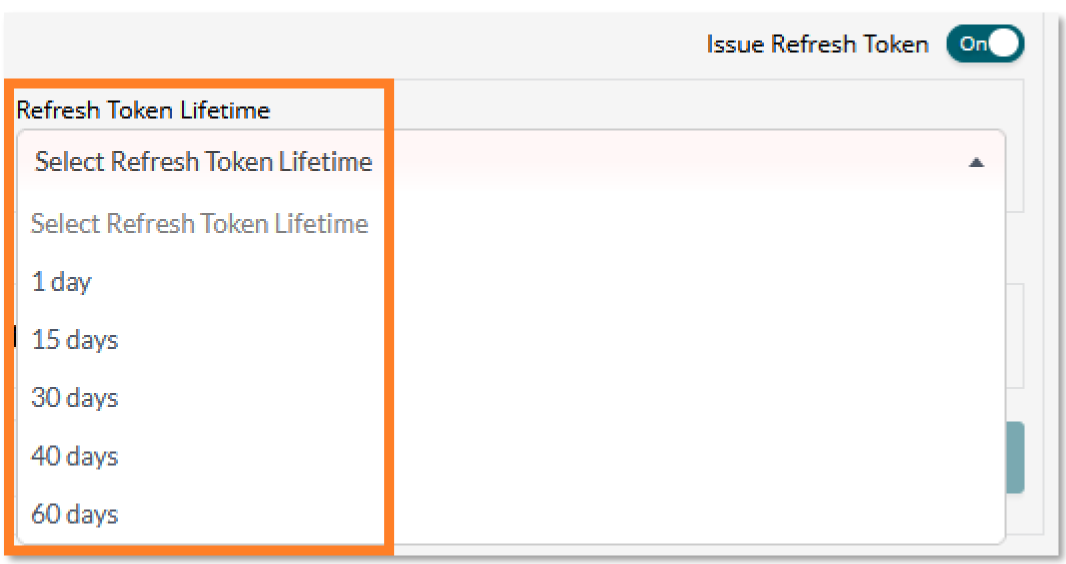
Next you must enter the **Issuer** URL, **Metadata** URL and **Audience**, as captured from the configuration within your Identity Provider:

Next you will specify **Token Settings**:



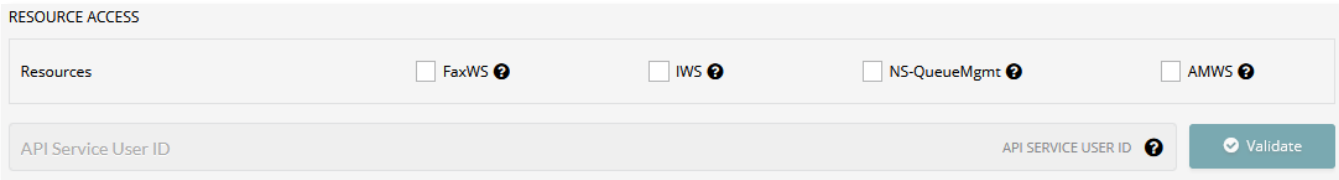
You must specify an **Access Token Lifetime** duration.

The option to **Issue Refresh Token** will be defaulted to off. **Enable** as preferred to configure the Refresh Token:



Here you can configure the **Refresh Token Lifetime** duration for the optional Refresh Token, if applicable to your authentication requirements.

Next, you must specify the **Concord API Resource**(s) that will be leveraged by the authenticating entity (admin or user):

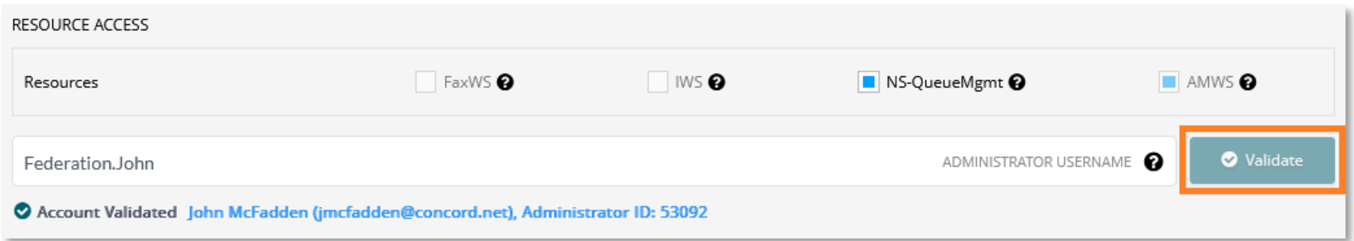


Resources are allocated according to the **role** of the Concord account that will be associated with the application and whether the account is a **User** or **Admin**:

User Resources	**Fax Web Services (FaxWS):** Used to send faxes to destination fax numbers and poll for transmission status.
	Inbound Web Services (IWS): Used to poll the Cloud Fax platform for inbound fax activity and download faxes following receipt.
Admin Resources	**NEXTSTEP Queue Management Webservices (NS-QueueMgmt):** Used to administer NEXTSTEP Shared Queue settings and associated users.
	Account Management Web Services (AMWS): Used to manage Concord account and user settings, provision/deprovision and query for activity reports.

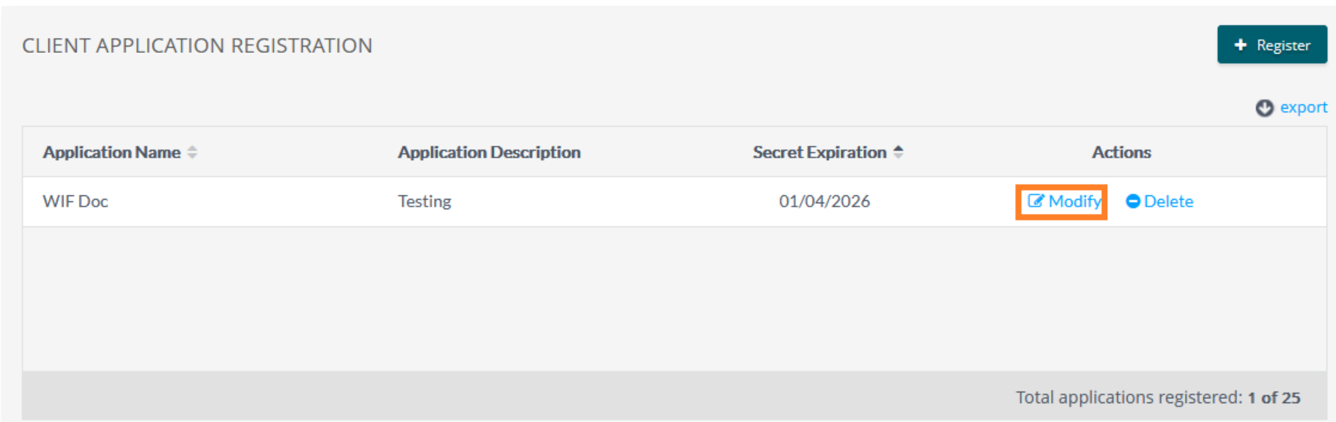
Based on the resource(s) selected, you will be prompted to insert a **Cloud Fax API User ID or Cloud Fax Admin Username** to associate with this configuration:

Enter the appropriate account information and click **Validate** to have the account validated and associated with this configuration:

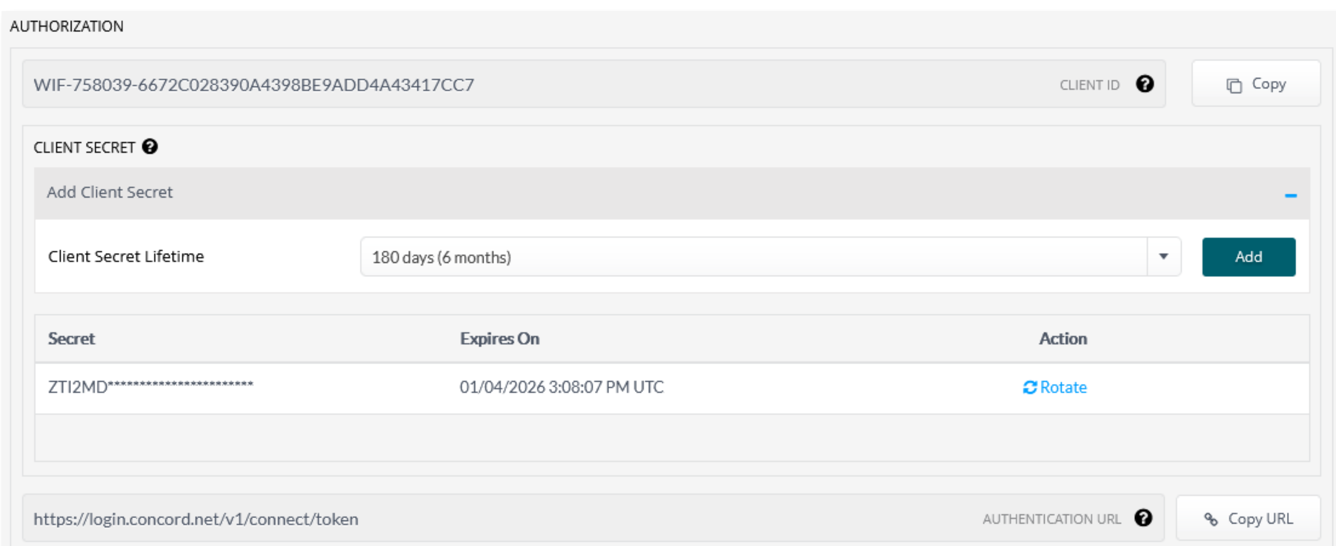


Once the account is validated click **Save** to finish and register the application.

You will now see your application listed under Client Application Registration with the option to **Modify** or **Delete**:



Click **Modify** to access the authorization details for this application:



Here you will find the **Client ID**, **Client Secret** and **Authentication URL** for the application.

This information should be copied from Concord and embedded within a customer's authentication process when making API calls to the supported Concord resources.

Note that you can add up to **two Client Secrets** to each application registration. From this screen you can add an additional Client Secret and dictate its **Lifetime**.

Note also that you can update a Client Secret at any time by clicking **Rotate**.

For additional information regarding Concord APIs and authentication, please see the Concord Developer Portal.

Departments and Department Settings

Departments act as **containers** for a set of users, grouped together for various reasons. Typically, this means users are grouped according to a customer's own **organizational structure**. Departments may also contain **sub-departments**, with possible nesting of sub-departments multiple levels deep:

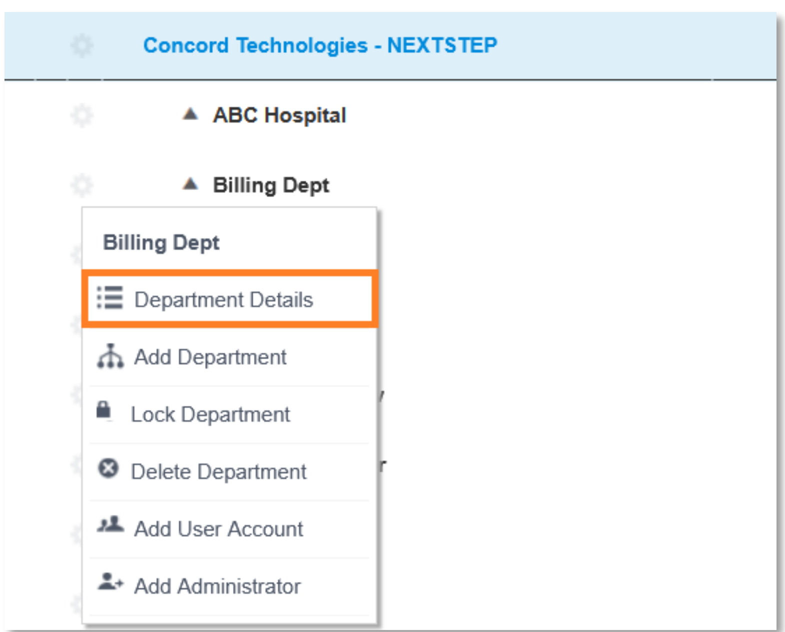
Company -> Department -> Sub-Department Level1 -> Sub-Department Level 2

There are typically **three** general reasons for using departments:

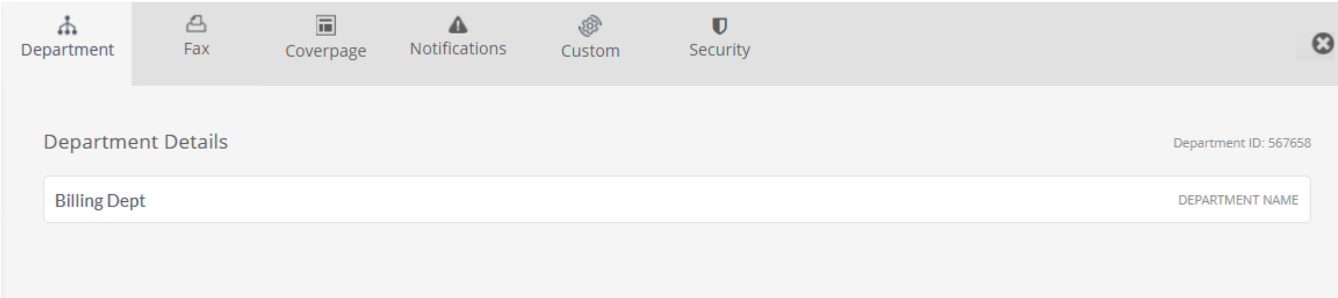
- **Billing:** Concord will provide monthly invoices with department-level breakout of users, usage and cost.
- **Settings:** Departments may contain their own settings, applicable specifically to the users in that department. This allows departments to have their own coverpages, for example, which are only available to users in that department.
- **Access:** Administrators may be created at any level of the hierarchy so admins may be provisioned in departments and sub-departments, which limits the scope of their access to only that level and any level that exists below it.

The **default** settings for Departments are managed in a very similar manner to the Company-level default settings discussed in the previous section. As departments are added, they will initially reflect the Company default settings. Settings can be **edited** at the Department level to create department defaults applicable to the users in each department and those settings saved at **Department** levels will override settings established at the **Company** level.

To manage settings at the Department level, **right-click** on the individual Department you wish to modify and select **Department Details** from the drop-down menu.



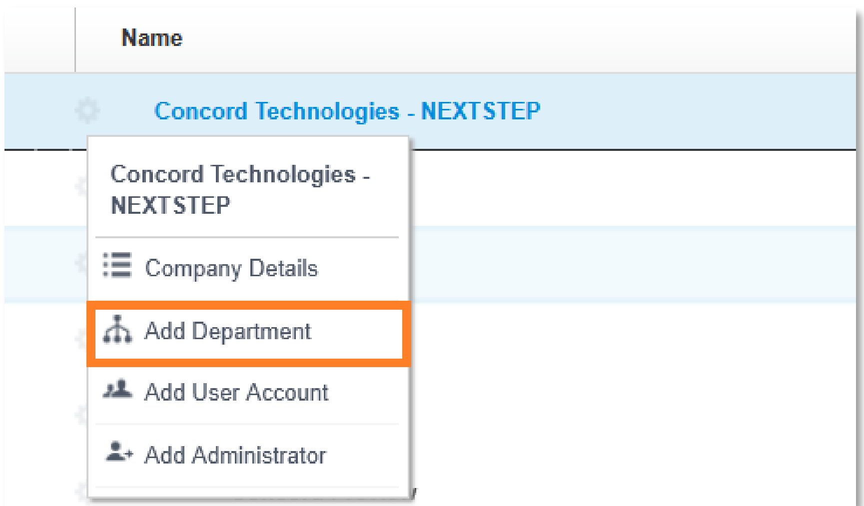
In the below example, the department **Billing Dept** has been selected and similar tabs to those displayed when viewing Company-level preferences are shown:



For details on the settings available in each tab, please refer to the Company-level settings.

Adding a Department

To add a new department, **right-click** at the Company level or at the Department level you wish to add a sub-department to and select, **Add Department**:



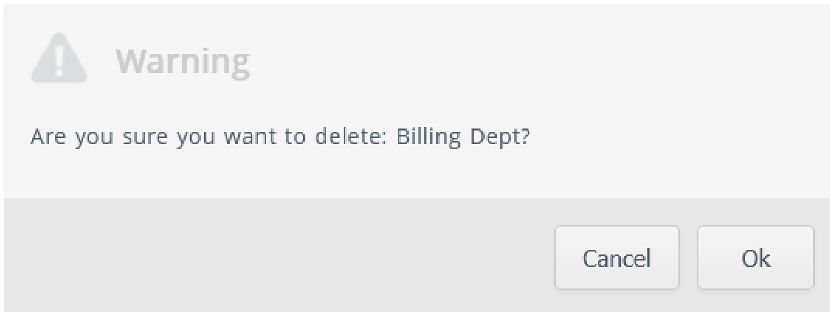
Enter the name you wish to assign to the new Department and click **Next**:

You will then select the default settings for **Fax**, **Coverpage**, **Notifications**, and **Custom,** clicking **Next** after completing each section. For details on the settings available in each tab, please refer to the Company-level settings.

To create the department, click **Finish**.

Deleting a Department

To delete a department, **right-click** on the department you wish to delete, and select **Delete Department** from the drop-down menu. A warning message will be displayed, which must be acknowledged by clicking **OK**, before the department is deleted:



Note that you **cannot** delete a department that has active Users. You will first need to **delete** or **move** all users within the department before deleting it.

Managing Departments

Department default settings can be **modified** after their initial creation. To modify the settings of an existing Department, simply **right-click** on the department you wish to manage and click **Department Details.** You will then have the option to edit all of the settings that you designated during the initial creation of the Department and have them apply to any associated User created **after the change is made**.

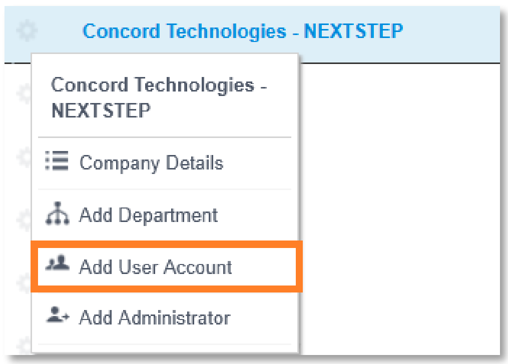
Note that changes made at the department level are **not** retroactive to existing users. To have new changes pushed from the department settings to existing users in that department, please contact **Concord Premium Support.**

Adding a User and User Account Settings

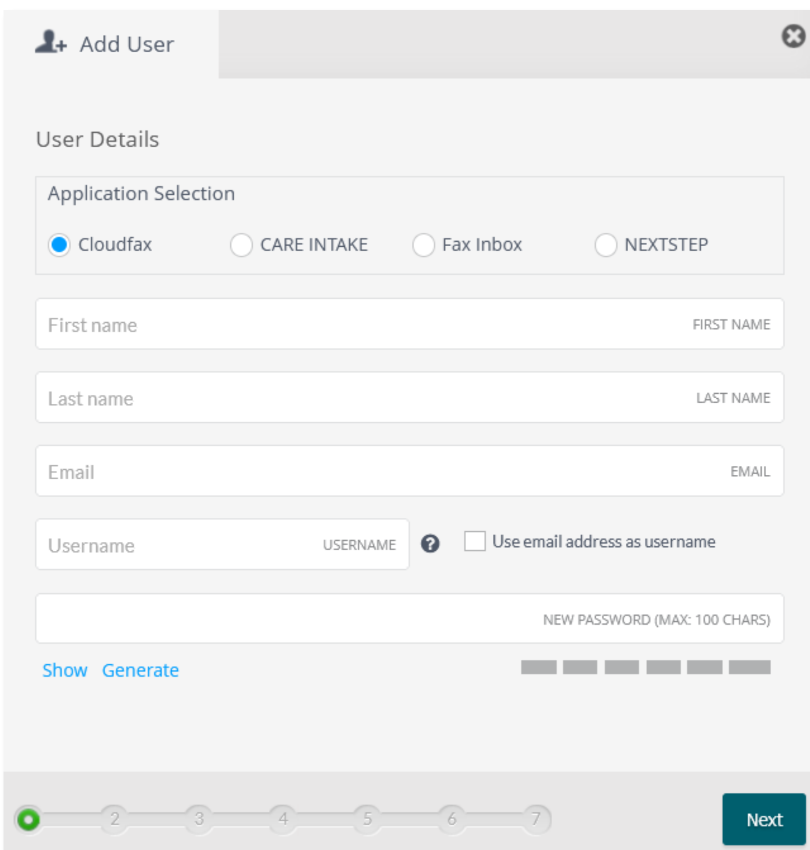
In this section we will review the **settings** that may be edited when creating a **user** account. There are several different **types** of user accounts that may be created, depending on which Concord **service** is to be used and the faxing methods that will be applied to that user.

This section will document the creation of a **Cloud Fax** user, oriented towards an email-based use case. Additional detail on creating other types of users may be found in guides corresponding to **other** Concord services**.**

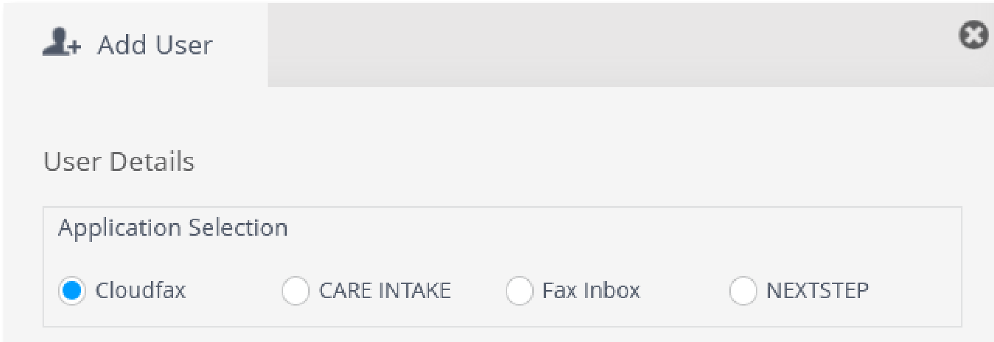
To add a new User, **right-click** on the gear next to the Company-level or the department in which the user should reside and click **Add User Account**:



As you create the user, you will be guided through **forms** in a series of tabs, some of which mirror the settings tabs found at the Company and Department levels:

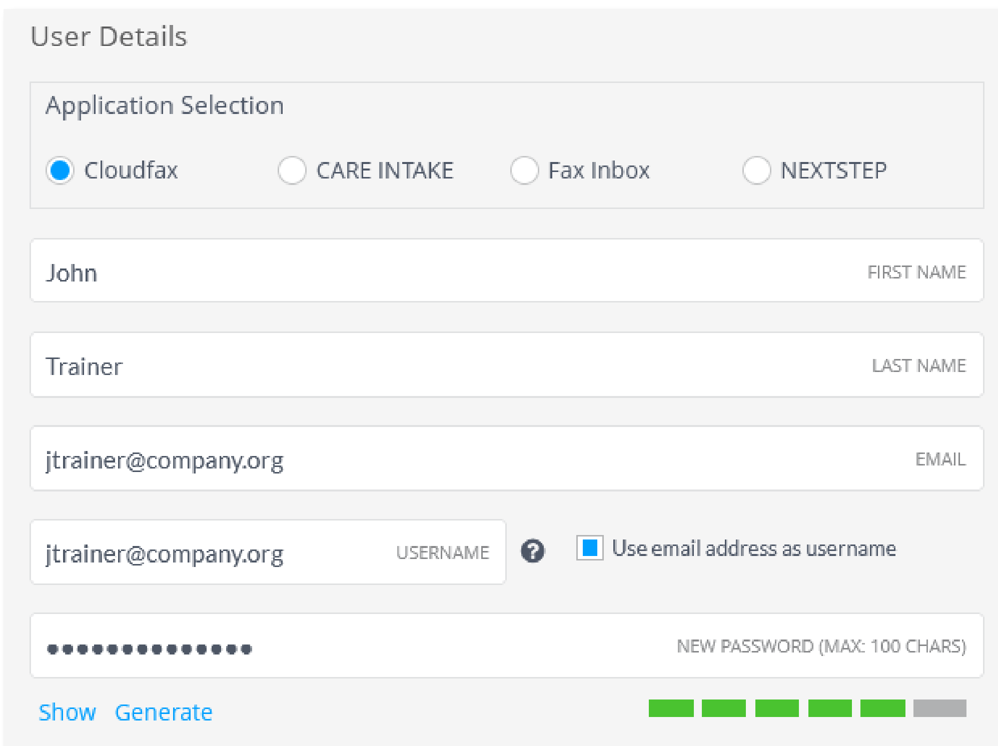


The form begins with Application selection:



Each selectable option allows for access to a different Concord service. The **choices** available here will depend on what services you have contracted for in your **Concord Service Agreement**. For the purposes of this document, we will be creating a **Cloudfax** user. Details on creating Care Intake, Fax Inbox and NEXTSTEP users and their related settings may be found in **other** Concord guides.

Next, add the user's **name**, **email** and preferred **authentication** credentials:

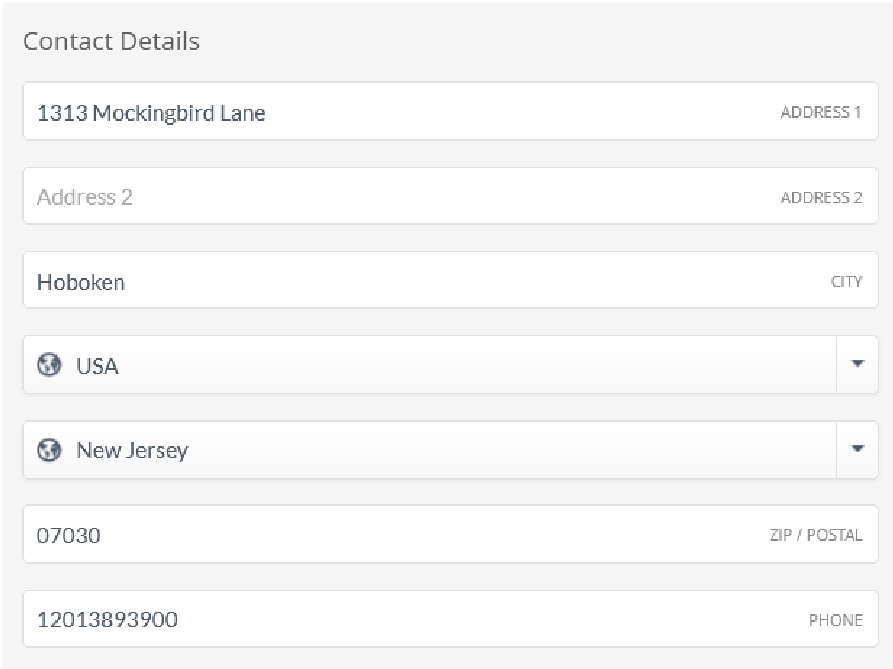


Note that the email address listed in **Email** may be used for **password resets** in the future.

It is typical to select **Use email address as username** when creating a user with the expectation that the user will log in to a Concord service such as **Print2Fax** or the **Cloud Fax User Portal**. You may choose another value to insert as username or you may choose to leave this blank. If left **blank**, Concord will issue a **system generated** username.

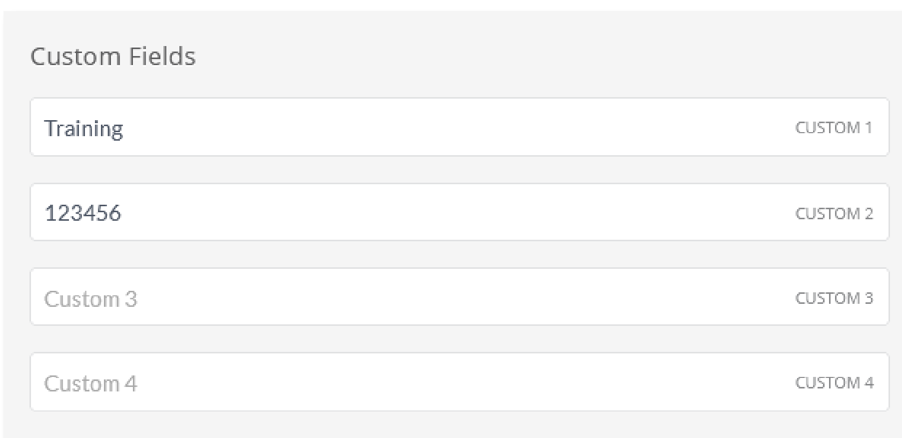
You have the option to **generat**e or **enter** a password directly. This is necessary to proceed to the next screen. A user will typically **reset** this initial password prior to authentication.

When ready, click **Next** to proceed to the **Contact Details**:



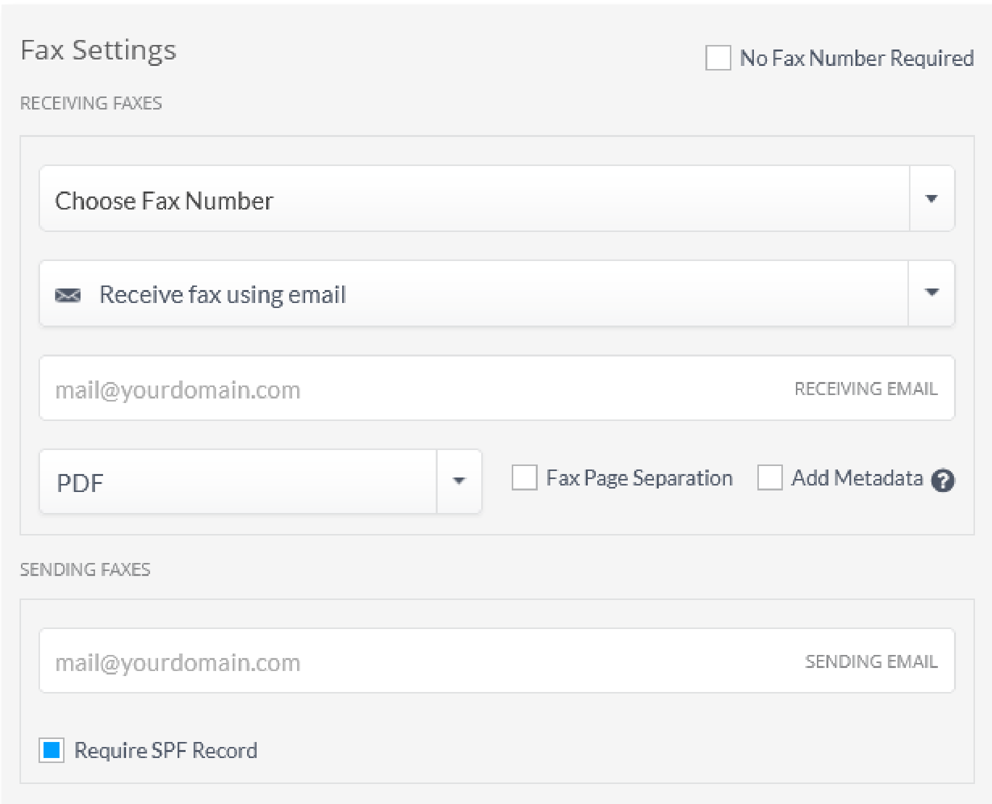
The data entered in this form is primarily used for population to Cloud Fax **coverpages**. Note that Concord default coverpages **do not** contain the necessary **tokens** to present this information and you must create a **custom coverpage** and insert the relevant tokens to make use of this data.

When ready, click **Next** to proceed to the **Custom Fields**:



Custom Fields are used to add **tracking** data to a user account. These often include data such as **Cost Center** and/or **Employee ID**. These fields will be added to any **reporting record** generated by this user when they send or receive a fax via their user account.

When ready, click **Next** to proceed to the **Fax Settings**:



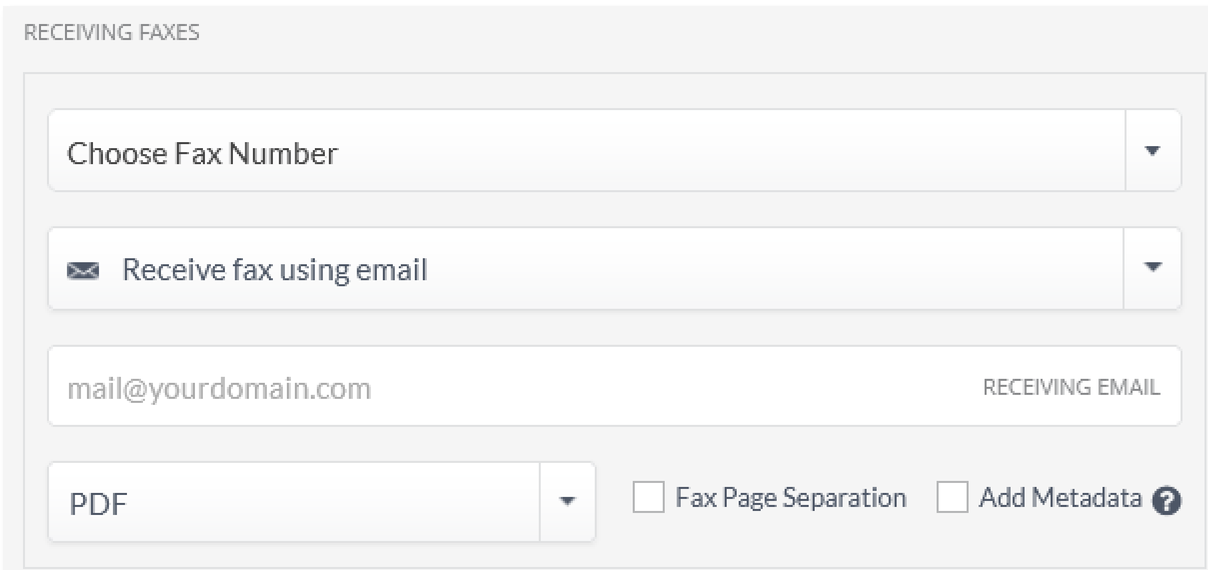
The approach to editing **Fax Settings** will depend heavily on the kind of user you are trying to create. Users may be designated as **outbound-only**, where no inbound fax number is directly associated to the user, and **inbound**-oriented users may be configured with **different methods** of delivering received faxes to a customer's intended destination(s).

At the **top** of the Fax Settings, you will see the check box for **No Fax Number Required**. Checking this box will disable the selecting of an inbound fax number and any associated inbound routing. This will designate the user as **outbound-only**, with no inbound capability to receive faxes directly to this user account:

If you are creating a user that is expected to send faxes via **email,** enter the user's email address in the **Sending Email** window. If no email is entered, this user will be expected to **authenticate** to send, using services such as **Print2Fax** or Concord's webservices **API**.

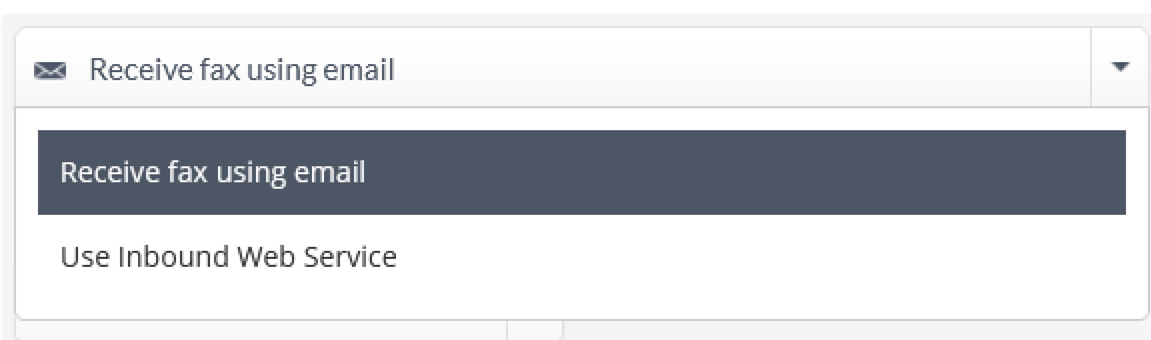
Require SPF Record specifically pertains to a user sending faxes via **email** and is used as a mechanism to prevent **spoofing**. This will be checked by default and typically should remain so.

When **No Fax Number Required** is **unchecked**, the ability to configure inbound faxing will be revealed:



Via the **Choose Fax Number** drop down you may select **one** fax number to associate with this user. You can add **additional** fax numbers to the user account following user creation. You must have a fax number in your **Unassigned Fax Number Inventory** to select from the dropdown list. If the dropdown list is empty, you can add a new fax number from the Dashboard via **Request New Inventory**.

In addition to selecting a fax number for inbound receipt of faxes, you must configure the **method** that will be used to deliver inbound faxes to a **destination endpoint** for that user. The dropdown selection will include **email** by default but may also include **Inbound Web Service**:

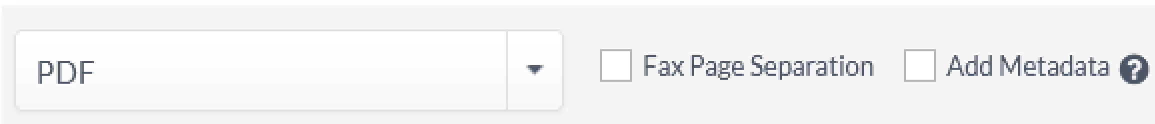


If you intend to have inbound faxes delivered to one or more email addresses, select **Receive fax using email** and enter the **primary email address** for delivery. You will have the option to add up to **two additional** email addresses for inbound delivery following user creation.

The option **Use Inbound Webservices** would be selected if you intend to leverage Concord's **Inbound Webservices API** or the Concord **Fax Assist** software client to retrieve inbound faxes.

One additional inbound delivery method may be revealed following user creation to deliver faxes to an **SFTP** site. Documentation on these methods may be found in other Concord guides.

As needed, you may also edit the settings pertaining to **file type** selection, **Fax Page Separation** and **Adding Metadata** to the inbound fax delivery:



The **Inbound File Type** selection will be defaulted to **PDF**. Other file types are possible. Note that if you intend to use **Fax Assist** to send inbound faxes directly to a network **printer**, you must choose **TIFF**.

Enabling **Fax Page Separation** would split inbound faxes into a **single document per-page**. This is **rarely** enabled.

Enabling **Add Metadata** would attach a metadata file, typically **XML**, to the delivery of inbound fax messages. This is **rarely** enabled for email-based faxing but may play a role in fax integration.

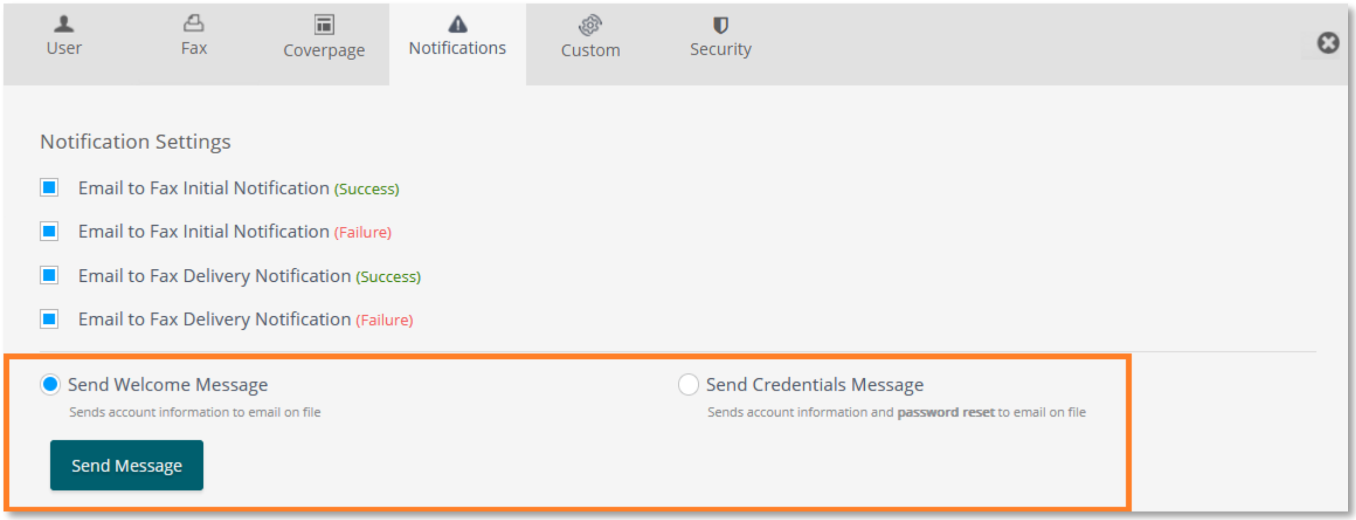
The remaining tabs all correspond to tabs that are set by default at the Company or Department levels. These are the **Coverpage Preferences**, **Notification Settings** and **Date/Time Format** tabs. You may choose to **accept** the defaults present on these tabs or **update** specific settings, now at the user level.

For details on these settings, please see the Company level settings.

When all relevant settings have been entered or updated, click **Finish** on the final, **Date/Time Format tab**.

If the user you have created is **inbound-enabled**, the fax number you have associated with the user will now become **active** and capable of receiving faxes.

Note that **no** automated notification will be generated to new users upon creation. If you want to send a user a welcome notice, click on the user's **name** and navigate to the **Notifications** tab. There you will see options to send a **Welcome Message**:

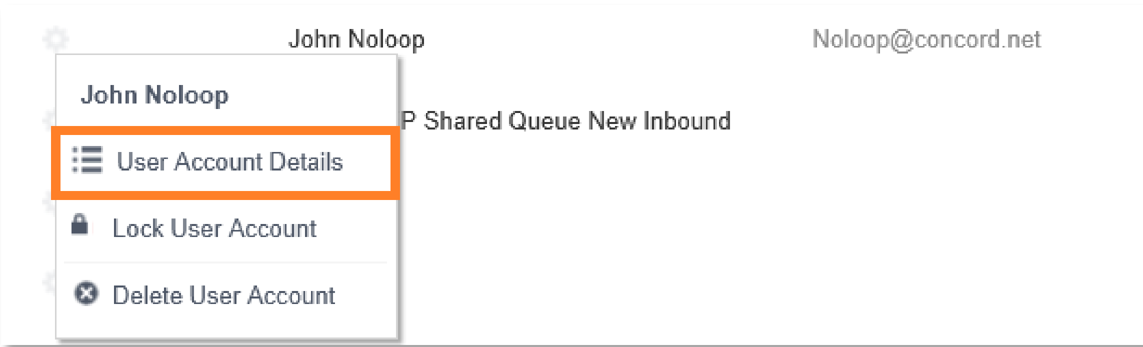


The **Send Credentials Message** content will include a link to reset the user's **password** and should be used when there is an expectation that the user will be authenticating to a Concord service.

The standard **Welcome Message** will include base Concord account information, but **no** password reset link.

Managing Users

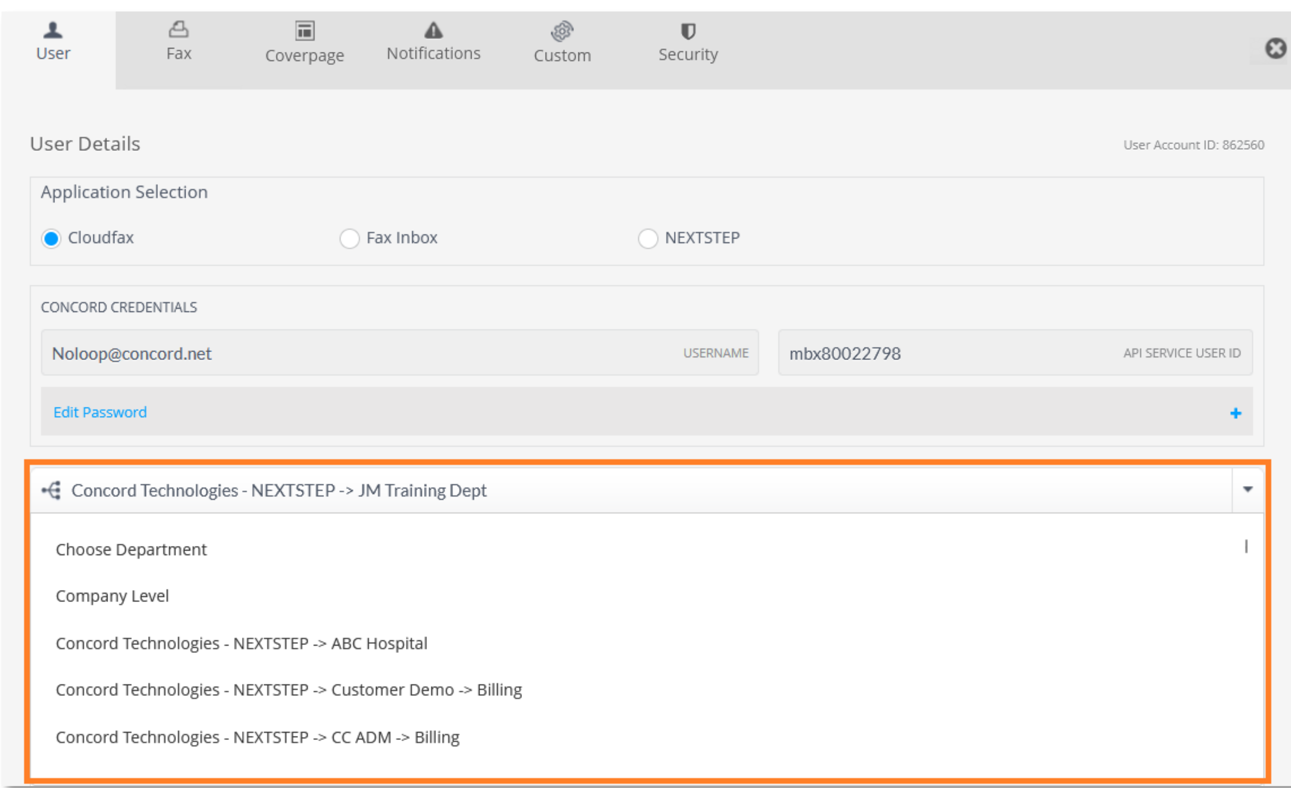
Users and user settings can be modified after the initial creation of a user. To modify the **settings** of an existing User, click on the user's **name** or right-click on the **gear** next to the user you wish to manage, and click **User Account Details**:



You will then have the option to **edit all** settings that you designated during the initial creation of the User.

Reparent a User

As users **move** to new sites or positions in your organization, you may have need to move a user from one **department** to another. This reparenting can be done by clicking on **User Account Details** to open the first tab in a user account profile:



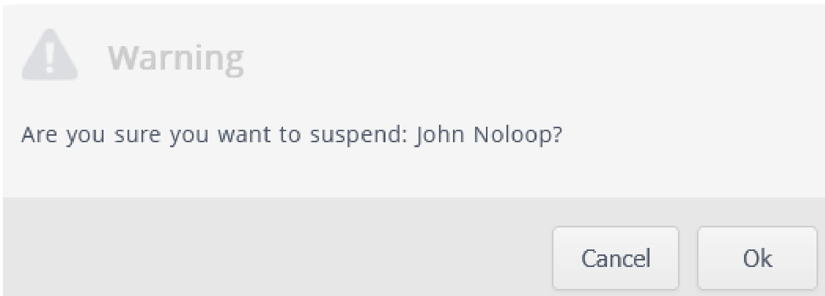
As per the above example, you will see a **dropdown** selector indicating the user's current department. To move the user to a new department, select the **new department** from the dropdown list.

When the proper department has been selected, click **Save** to move the user.

Lock a User

To temporarily **suspend** a user's ability to authenticate to Concord services and **prevent** them from sending and/or receiving faxes for a period of time, you can **lock** a user account.

To lock an account, **right-click** on the **gear** next to the user you wish to suspend and click **Lock User**. The following warning message will be displayed:

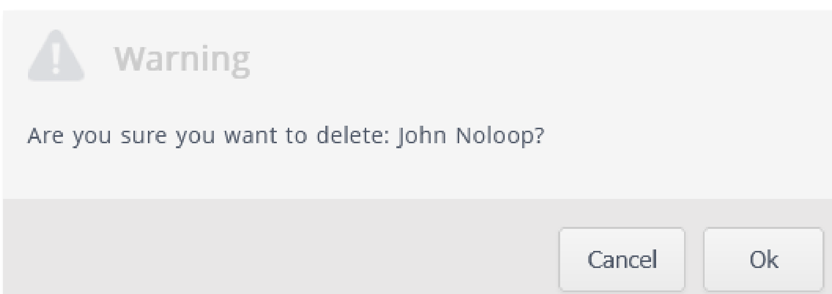


Click **OK** to lock the user account. The user will remain in locked status until an authorized Cloud Fax admin **unlocks** the user account. If the user is assigned a **fax number**, that fax number **will not** be capable of receiving faxes while the user is locked.

Delete a User

Deleting a user account will **remove** that account from Concord's platform and return any **fax number(s)** associated with that user to your **Unassigned Fax Number Inventory**. Records of user inbound and/or outbound activity will remain available for a period, via Concord's standard Cloud Fax **Activity Reports**.

To delete an account, **right-click** on the **gear** next to the user you wish to delete and click **Delete User**. The following warning message will be displayed:



Click **OK** to delete the user account. Once a user is deleted, that user account **cannot** be recovered and can only be **recreated** as new.

Concord Administrators

Concord Administrator accounts are used to manage the **settings**, **routes** and **users** that make up a Concord Cloud Fax account. Admin accounts may also be used to run **automated** administrative services such as Concord's **Account Management Webservice**.

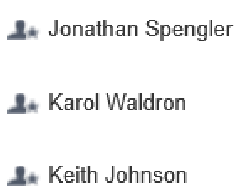
Admins may be provisioned at the **Company** level, providing access and/or visibility into an entire organization, or they may be provisioned at the **Department** or sub-department levels, isolating access to a particular place in a customer's account hierarchy.

One or more admin accounts will typically be created at the inception of your Concord account, based on provisioning instructions provided during **implementation**. From that point forward, additional admin may be created by other customer admins, with **no limitation** on the number of admins an account may have.

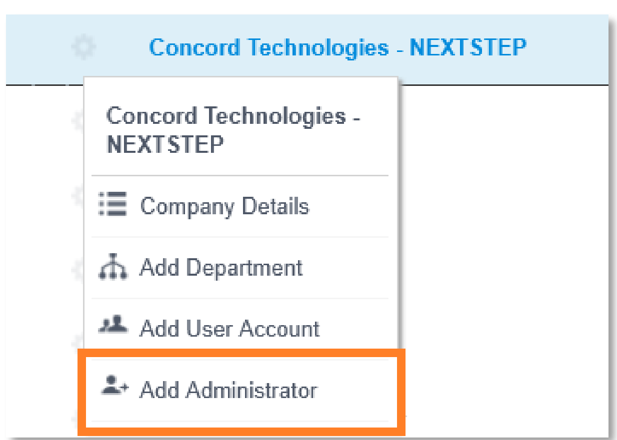
Once an admin account has been created, **access rights** can be further defined to suit the admin's needs but **restrict** access to specific functions, as needed. By default, **Company-level** admins can make changes to other Company-level admins and to the Department-level administrators at each level. **Department-level administrators** may control other admins in their department as well as admins that exist in any sub-departments within the department.

Create an Admin

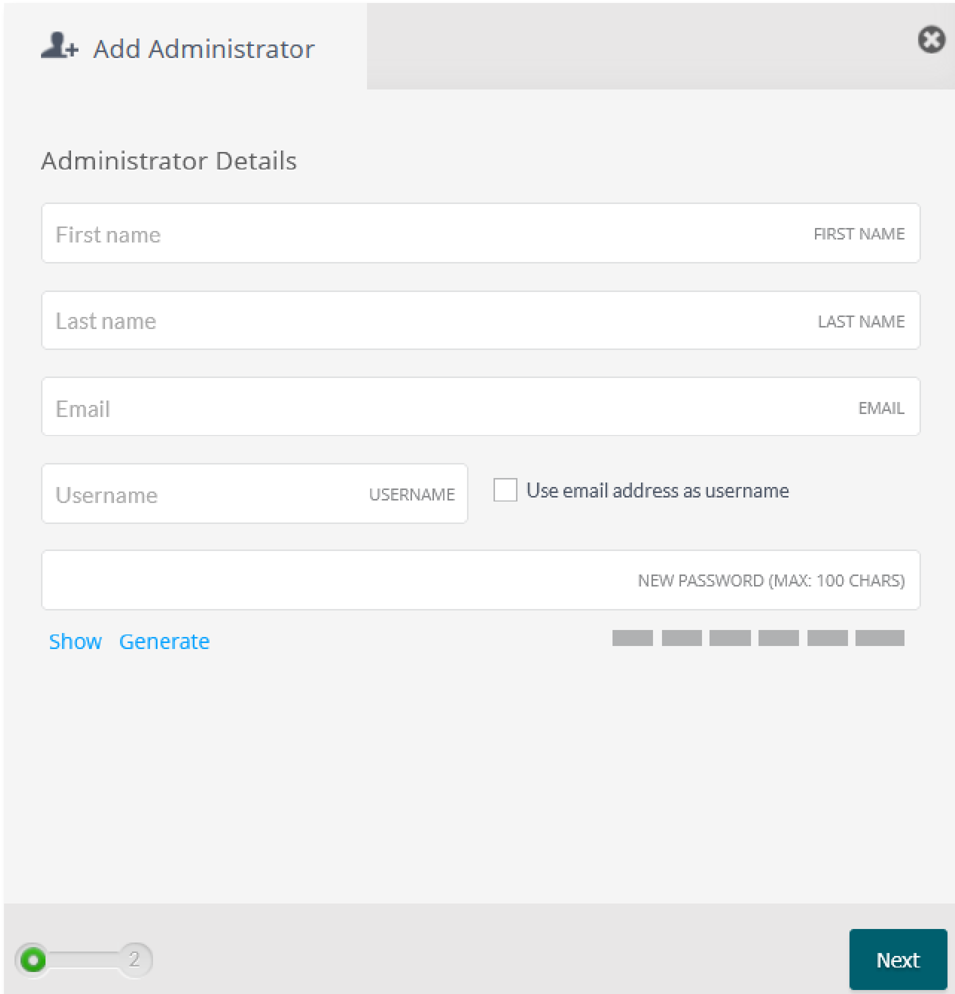
Admins are visible in the **Account Administration** section of the Concord Cloud Fax Admin Portal, noted by the **starred silhouette** icon:



To **create** a new admin account, right-click on the **gear** at the account level you want to add the admin to and click **Add Administrator**:



You will then be prompted to complete a series of **required** fields concerning the new Administrator:



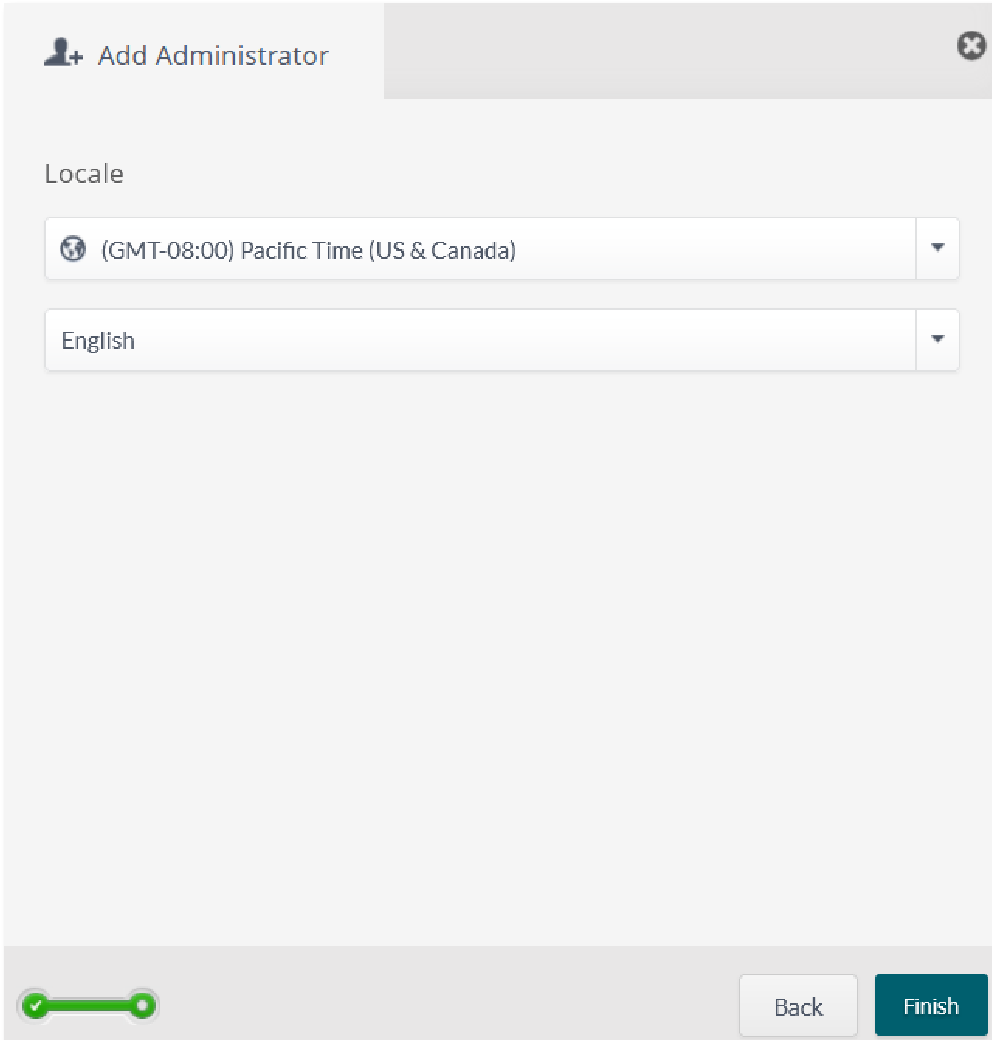
Enter the First and Last **Name** that will be used to identify the admin.

Add an **Email** address that can be used for password resets, if needed. Note that the email address **does not** need to be unique to this admin account and may be used on other Concord admin accounts.

Set the **Username** for the admin. The Concord standard approach is to use **Firstname.Lastname** as the admin username format, but you may format the admin username according to your own preferences.

Enter or generate a **password** for the admin. This will typically be **temporary**.

When ready, click **Next** to set the **timezone** default for your admin:



Select the appropriate **timezone** from the dropdown, if necessary. This will be defaulted based on company or department settings

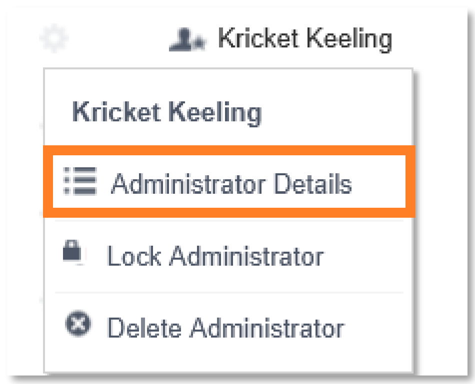
The **language** selection dropdown may be **ignored**.

When ready, click **Finish** to create the admin.

Administrator Rights

As mentioned, administrators can be created at various levels in the Concord account **hierarchy**. The **level** at which the admin is created will dictate which **departments** and **users** the admin has access to manage. An admin may also be constrained by admin **Rights**, which dictate what **functions** an admin has access to and what they can **change**.

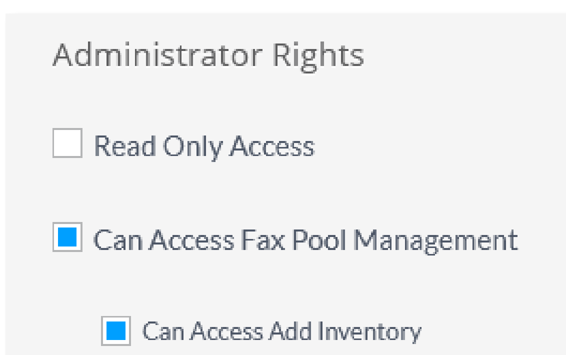
To manage the permissions of an Administrator, **right-click** on the Administrator that you wish to manage and select **Administrator Details**:



The Administrator Details page has three tabs, **Admin**, **Rights** and **Security Policy**. The first **Admin** tab contains contact information for the admin, the level/department at which they have administrative privileges and their time zone and language preferences. The third **Security Policy** tab may be used to set password requirements specific to this admin. This is **rarely** done at an individual admin level.

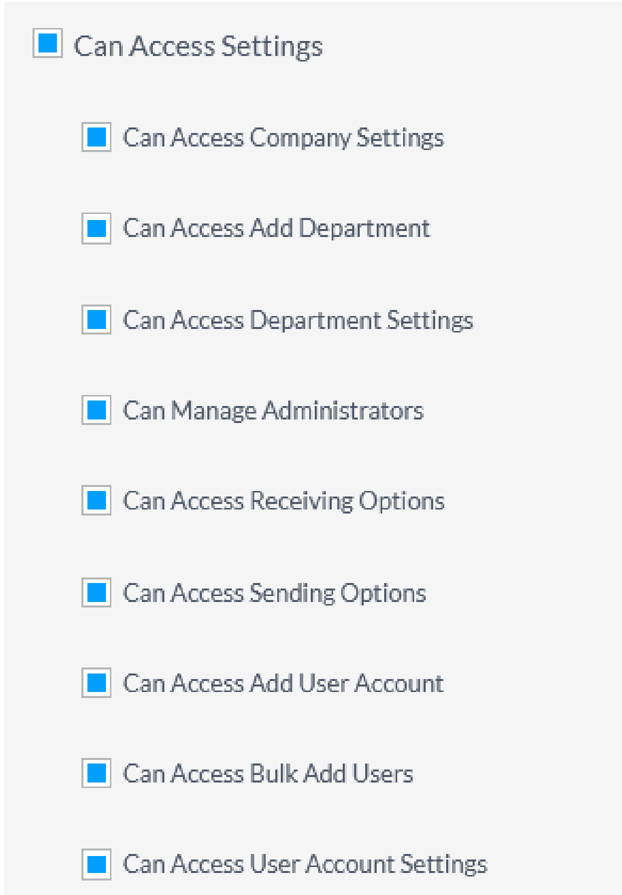
The middle tab is labeled **Rights** and contains a checklist of administrative rights that may be set for this admin.

Beginning at the **top** of the list:

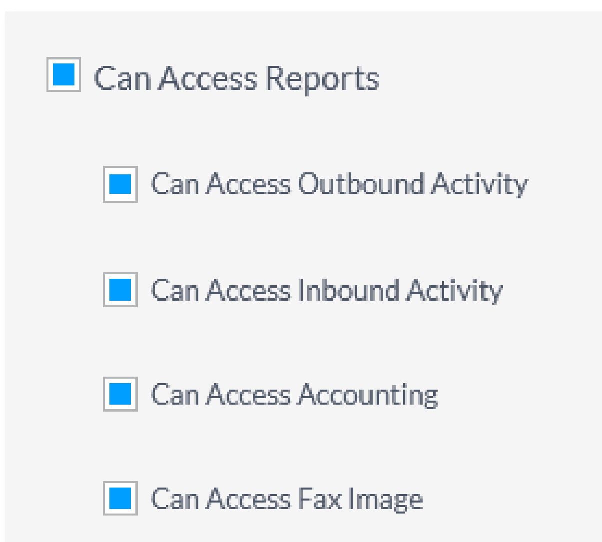


Selecting **Read Only Access** would render this admin incapable of making any changes to company, department or user settings, but allow for visibility into settings and reports according to selected rights.

Rights related to **Fax Pool Management** and adding **Inventory** control access to view, export and append the list of fax numbers available on your account.

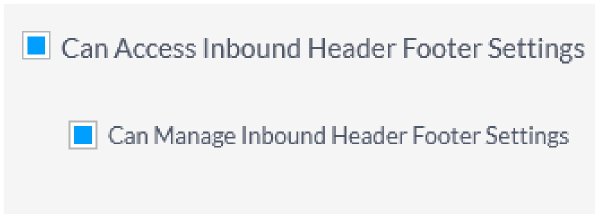


Can Access Settings and related rights govern an admin's ability to view and potentially edit settings at the company, department or user levels, as well as add new users and admins. You can choose to **remove access** to settings altogether or choose what specific settings an admin has the rights to edit.

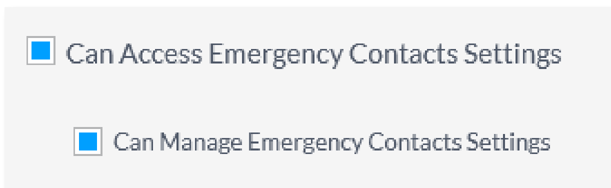


Can Access Reports and related settings controls access to detailed activity reports, month end billing details and stored outbound fax images, **if** images are being retained.

Can Access Security Policy and related **Manage Security Policy** rights control access to view and edit the Security Policy settings that exist at various levels of the hierarchy.



Can Access Inbound Header Footer Settings and related **Manage Inbound Header Footer Settings** rights govern access to add and edit headers and footers which may be stamped on inbound faxes following receipt.



Can Access Emergency Contacts Settings and related **Manage Emergency Contacts Settings** rights govern access to add and edit headers and footers which may be stamped on inbound faxes following receipt.

Can Manage Outbound Blocklist Settings controls access to view and edit a list of recipient fax numbers that users in your account are not allowed to send to.

Can Access Change Password (Self) allows an admin to manage their own password.

You may also see admin rights pertaining to access to **Apps** and **Workflow Identity Management**, if enabled.

Following any changes to the admin's rights, click **Save** to update the admin.

The third tab available to edit on an admin account is the **Security Settings** tab, which may be edited specifically for an individual admin if needed. For more information on the Security Settings, see Company Settings.

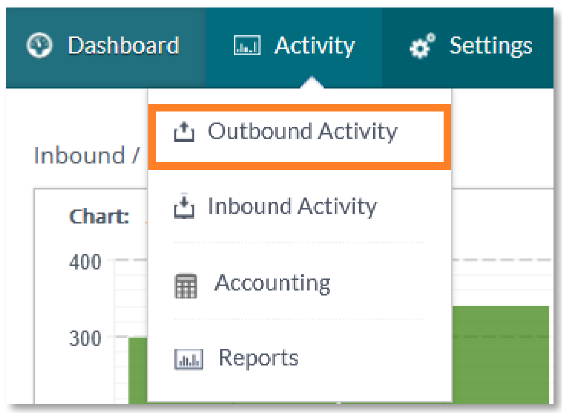
Outbound Activity Reports

Concord provides admin access to several different **fax reports** in the Cloud Fax Admin Portal. Most of these reports are available to admins at **all levels** of the hierarchy and may be used by both Company and Department-level admins to report on activity.

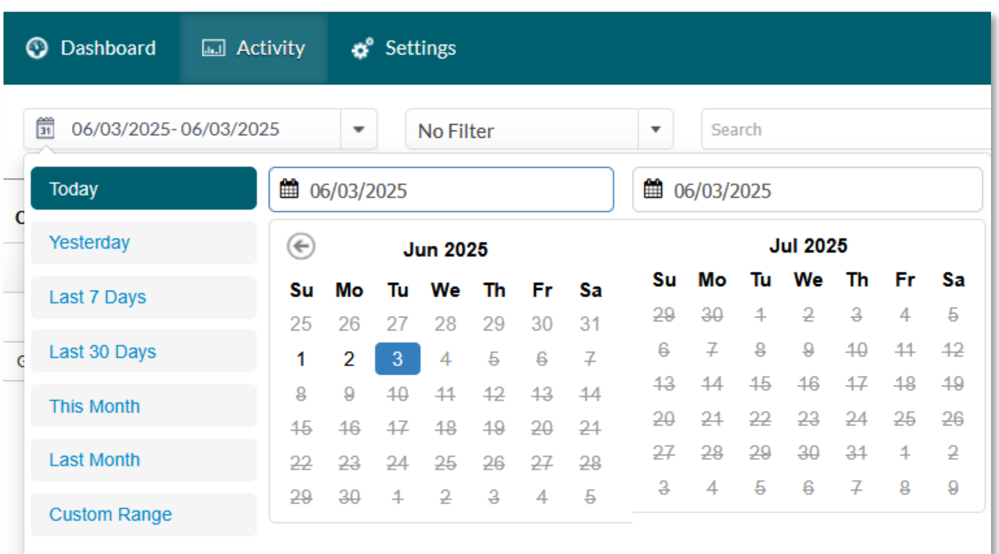
In this section we'll review the **Outbound Activity Reports**, which offer **90 days** of outbound fax activity logging and possible access to **view** and **resend** outbound faxes

Via **Outbound Activity**, you can query for any **outbound fax** transmission sent by any users over which you have admin control. Outbound Activity can be queried using a variety of **filters** to return message-level fax results for analysis and export.

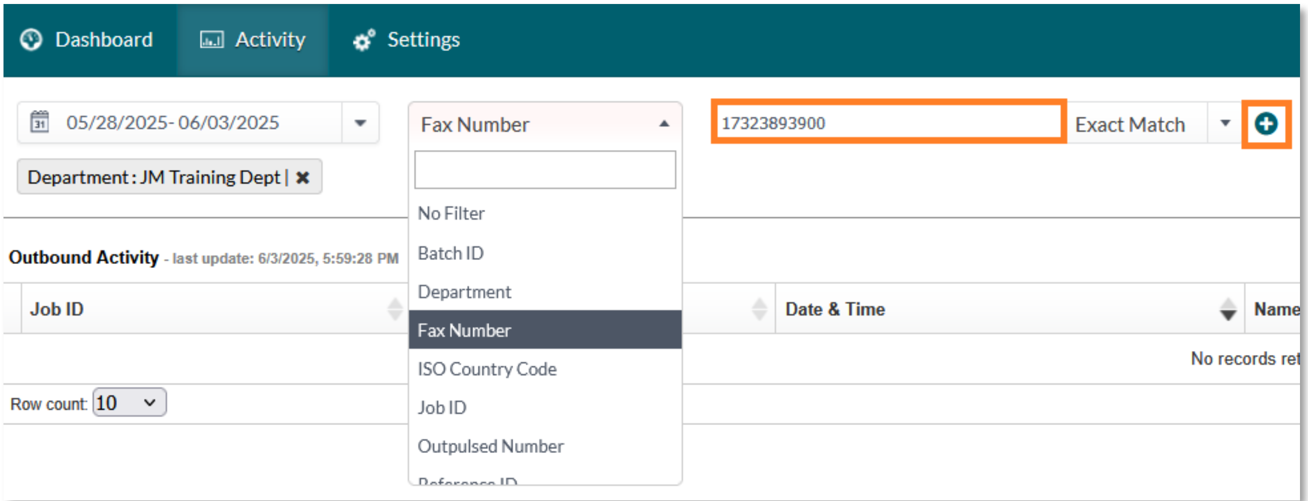
Click **Activity / Outbound Activity** to begin:



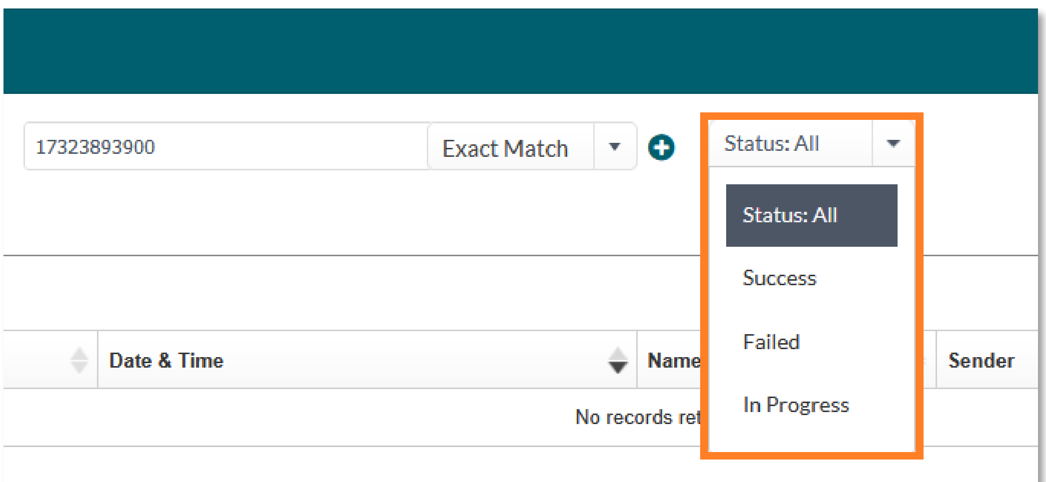
First, you may select the **Date Range** of the time period you want to search for results in. This must be a period within the last **90 days**:



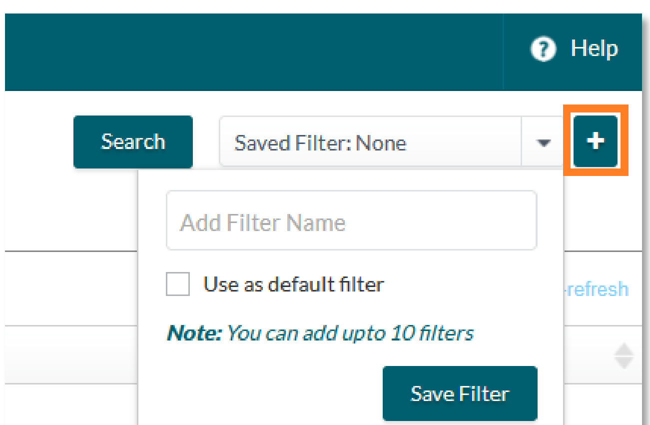
You may further refine your search by selecting a variety of **filters** such as department, recipient fax number, Concord Job ID, etc. You can layer filter criteria by clicking on the **CIRCULAR PLUS** symbol to add search parameters and enter new criteria:



You may apply an additional layer of filtering according to the fax **Delivery Status** of the outbound fax:

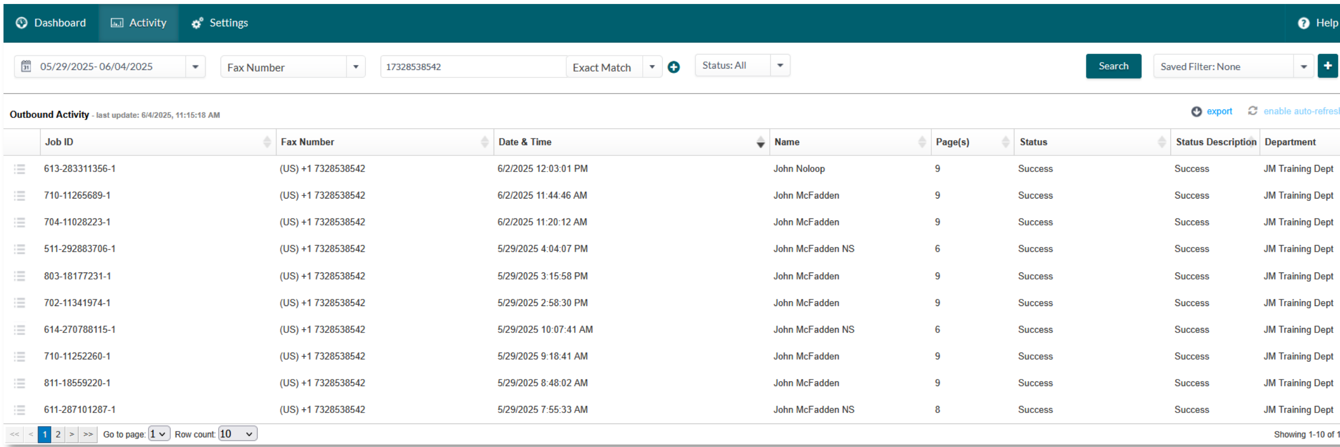


If you want to store your query for user later, click the **SQUARE PLUS** symbol to save up to 10 queries:

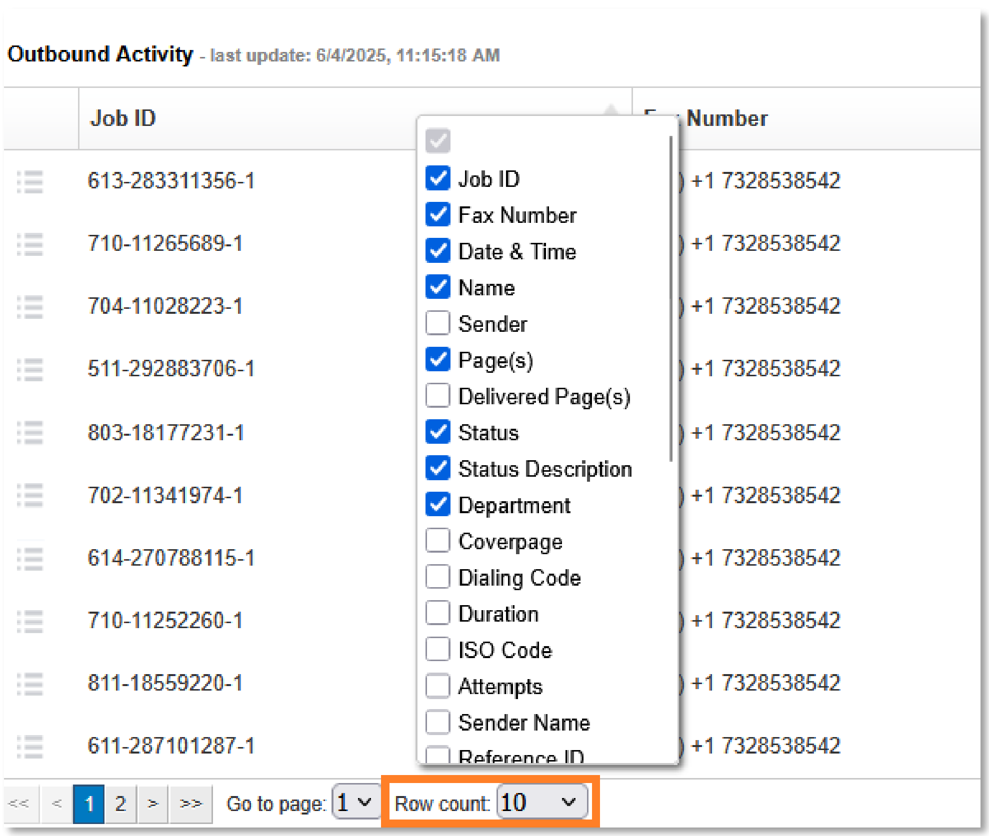


When you have entered your preferred filters and criteria, click **Search**.

All **outbound fax activity** within your selected range and filters will be returned:



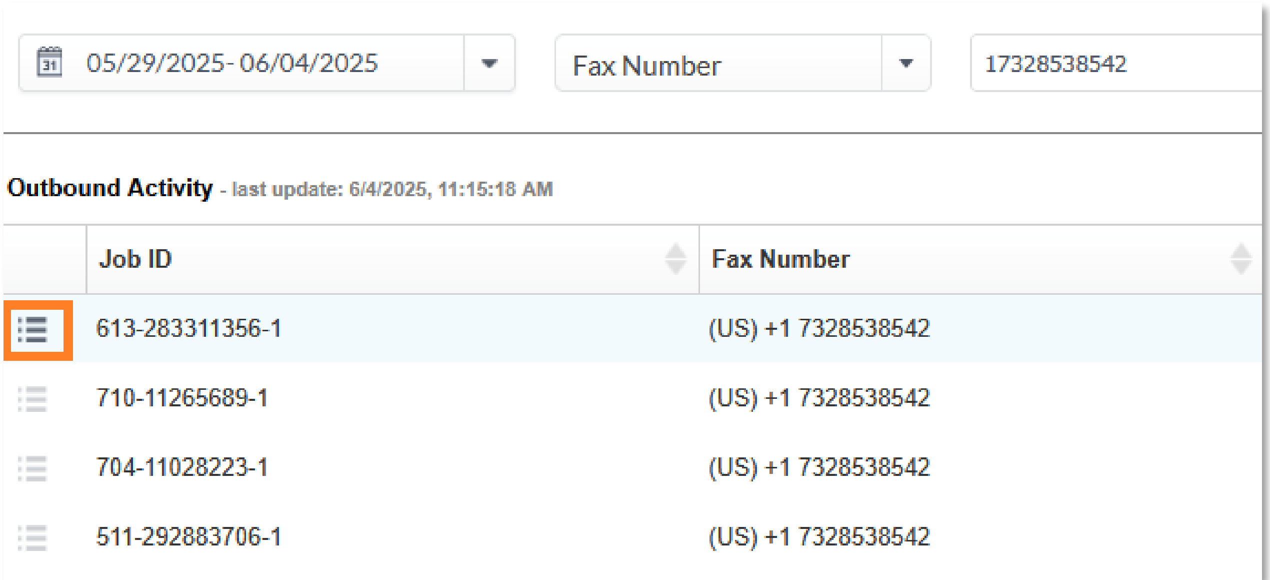
You can select which columns of data you want to display by **right- clicking** on the **column headers** and checking the **boxes** that correspond to the columns you wish to see:



You are also able to select the **number of records** you would like to see on each page, by selecting different values under **Row Count**: 10, 15, 20, 50, 100, 250, 500 or 1000.

Click **Export** to export results as a **CSV** file. The export will always include **all** columns possible.

To view **Activity Details** for a specific Job ID and access additional options to **view** the document, **resubmit** or **cancel** the fax (if applicable) click the **Show Details** icon next to the Job ID you want to view:



The **Activity Details** page will include detailed information about the user that sent the fax, coversheet and reference tracking, and the detailed logging of each attempt made to deliver the fax, as per below example of a fax number indicating **No Answer** on each of **four** delivery attempts:

Call Events

Date	Attempt	Message	Delivered Pages	Duration
5/29/2025 3:36:54 PM	4	No Answer	0	0 seconds
5/29/2025 3:31:48 PM	3	No Answer	0	0 seconds
5/29/2025 3:26:44 PM	2	No Answer	0	0 seconds
5/29/2025 3:21:36 PM	1	No Answer	0	0 seconds

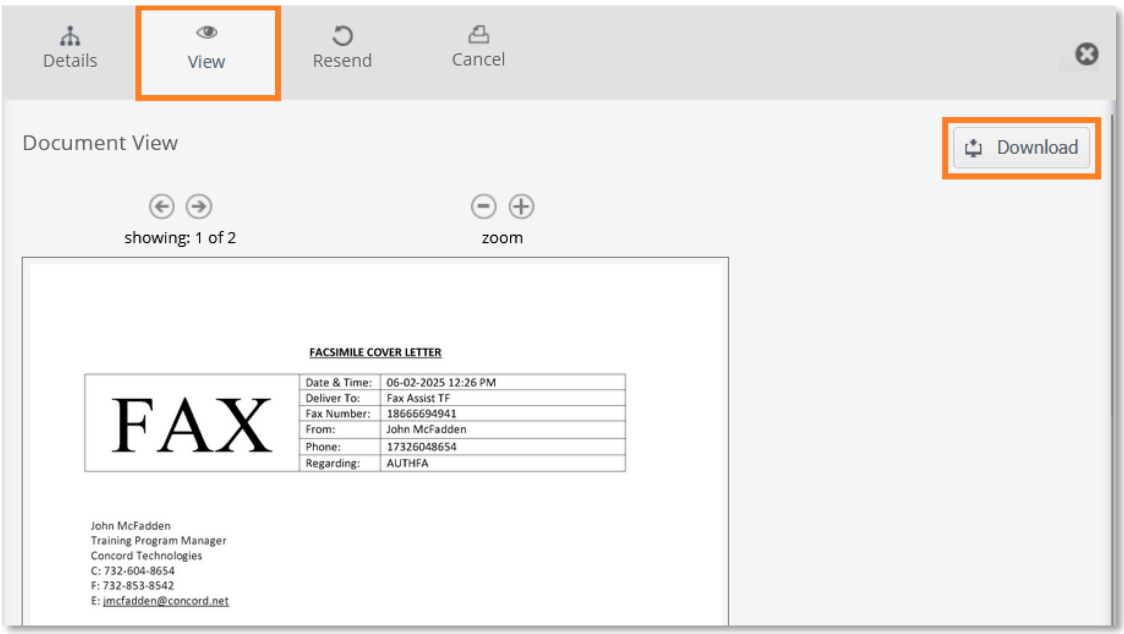
From **Activity Details** you will also see the options to **view**, **download**, **resend** and **cancel** faxes, as described below.

View, Download, Resend and Cancel

Opening the **Activity Details** associated with an outbound fax message affords access to **view, download** and **resend** the fax document, according to admin **rights** and fax document **retention**. It is also possible to **cancel** an outbound fax document while this is still in progress via Activity Details.

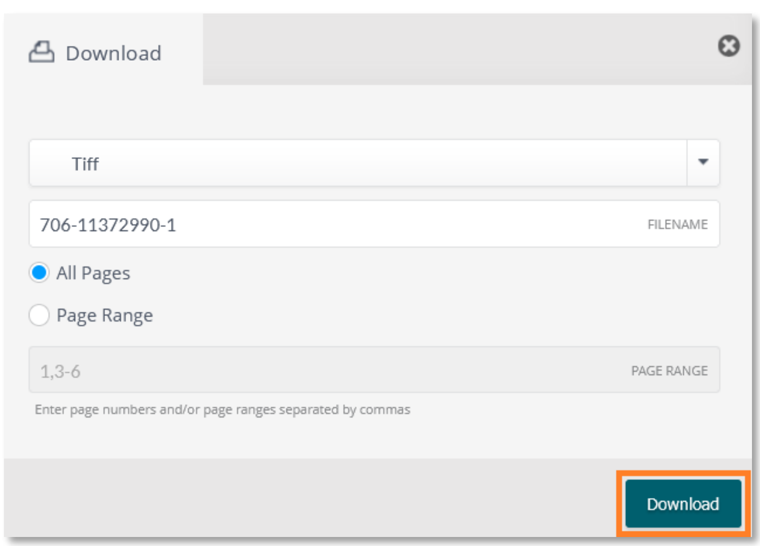
View and Download Outbound Fax Documents

To access the document content of an outbound fax to view or download, click **View:**



From here you may click the **<-/-> arrows** to navigate through the pages of the fax and the **-/+ zoom** buttons to change the size.

Click **Download** to launch the download screen:



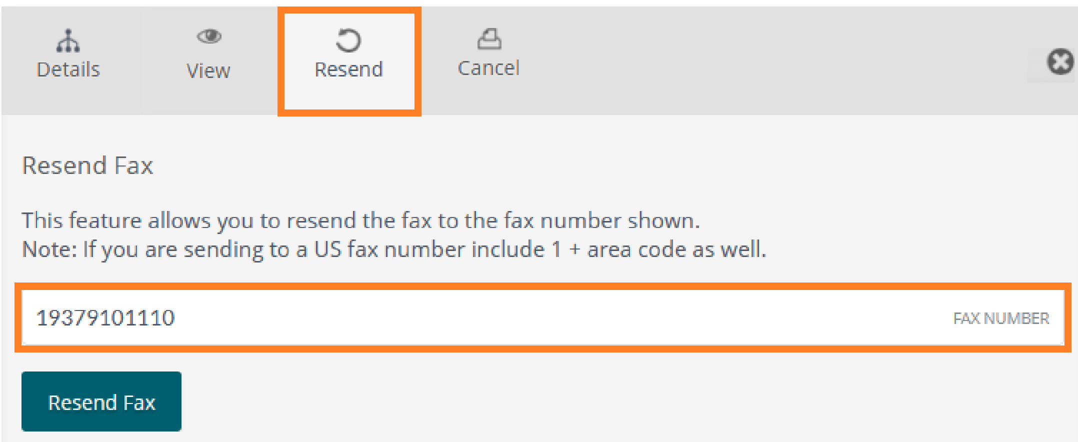
You may select between **TIF** and **PDF** file formats and the range of **pages** you want to download. The **default filename** will be the Concord Job ID, which may be edited as you download the file.

Click **Download** and the document will be downloaded according to your **browser download settings**.

Note that the Concord default for fax document storage is **7 days**. It is possible to set this period for **less** than 7 days but not for more. Once the storage limit is reached, documents will be **purged** from the Concord Cloud Fax platform and **cannot** be viewed or downloaded. **Metadata** reporting will remain available for a total of 9**0 days**.

Resend Outbound Faxes

Via **Resend**, you have the option to attempt **re-delivery** to the original fax number or to update the fax number and attempt delivery to a **new destination**:



Edit the **Fax Number** if needed to add a new destination and click **Resend Fax**.

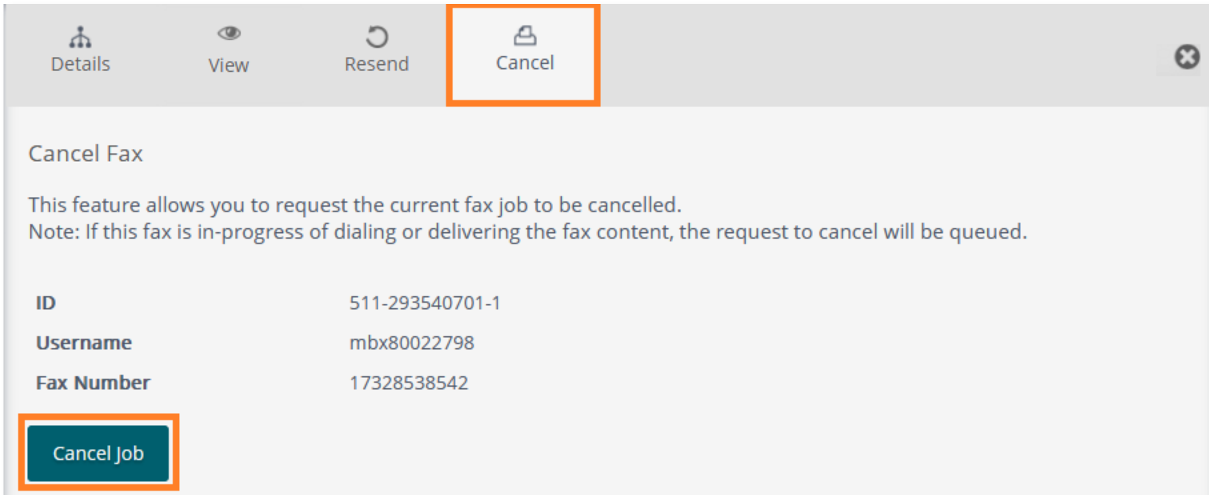
Concord will create a **new** outbound fax Job ID and perform fax transmission attempts as per the account **retry settings**, typically four attempts at five minutes apart.

Note that the Concord default for fax document storage is **7 days**. It is possible to set this period for **less** than 7 days but not for more. Once the storage limit is reached, documents will be purged from the Concord Cloud Fax platform and **cannot** be resent from Activity Reporting. **Metadata** reporting will remain available for a total of 90 **days.**

Cancel Outbound Faxes

It is possible for an admin to initiate a **cancel** request on a fax that's i**n progress**. This may cancel a transmission while **delivery** is in-progress or between **retry** attempts. The option is **only** available while the fax transmission is still **active**, and no cancel can be performed **after** a transmission is complete.

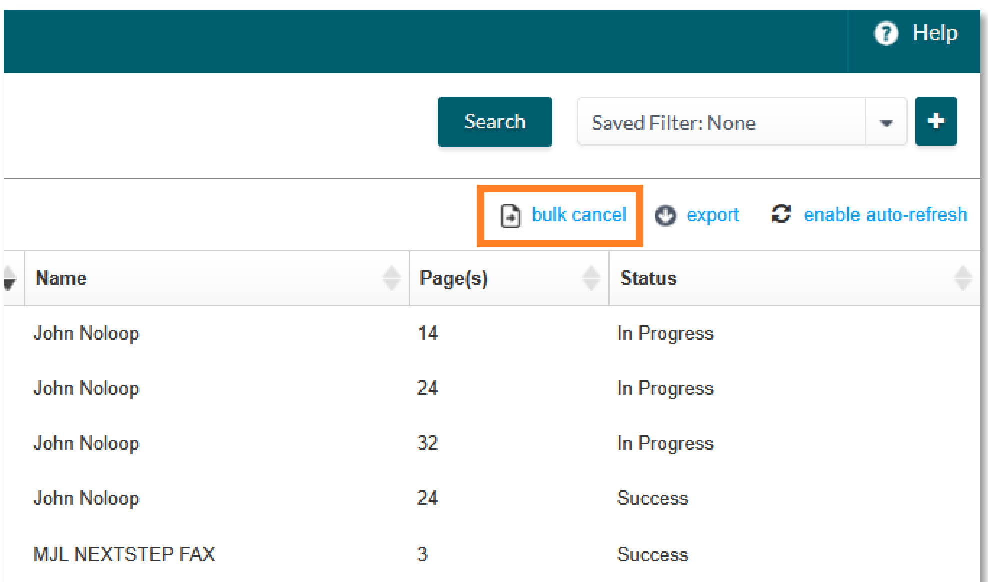
To access the Cancel function, click the **Cancel** tab:



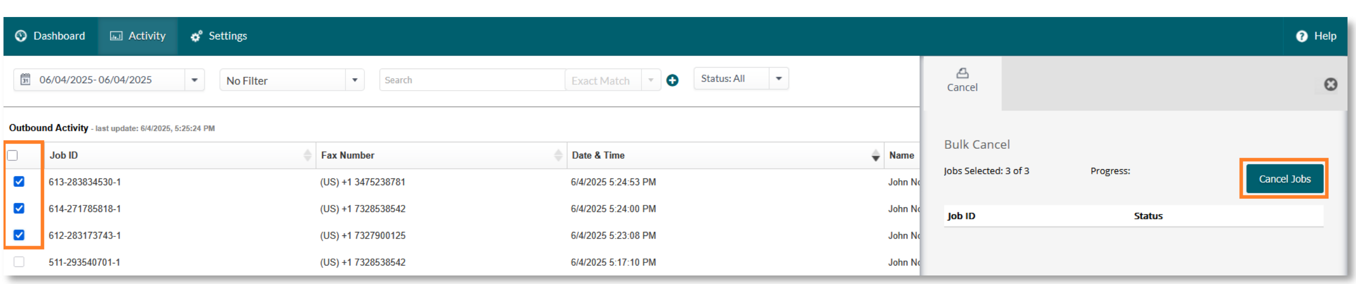
If the fax is still **active** you will have the option to cancel further transmission. Click **Cancel Job** to complete.

Bulk Cancel Outbound Faxes

It is also possible to cancel **multiple** in-progress items at once, via **Bulk Cancel**:



After clicking Bulk Cancel, **select** the in-progress items you want to cancel and click **Cancel Jobs**:



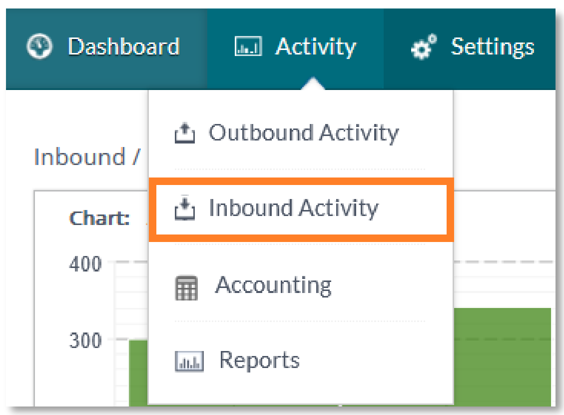
Inbound Activity Reports

Concord provides admin access to several different **fax reports** in the Cloud Fax Admin Portal. Most of these reports are available to admins at **all levels** of the hierarchy and may be used by both Company and Department-level admins to report on activity.

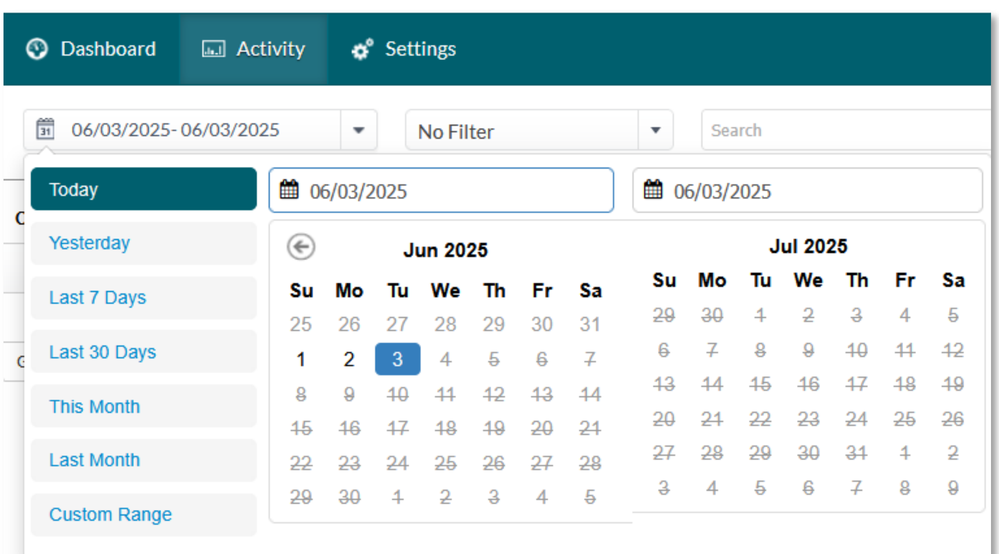
In this section we'll review the **Inbound Activity Reports**, which offer **90 days** of inbound fax activity logging and possible access to **resubmit** inbound faxes to their configured destination endpoint**.**

Via **Inbound Activity**, you can query for any **inbound fax** transmission sent by any users over which you have admin control. Inbound Activity can be queried using a variety of **filters** to return message-level fax results for analysis and export.

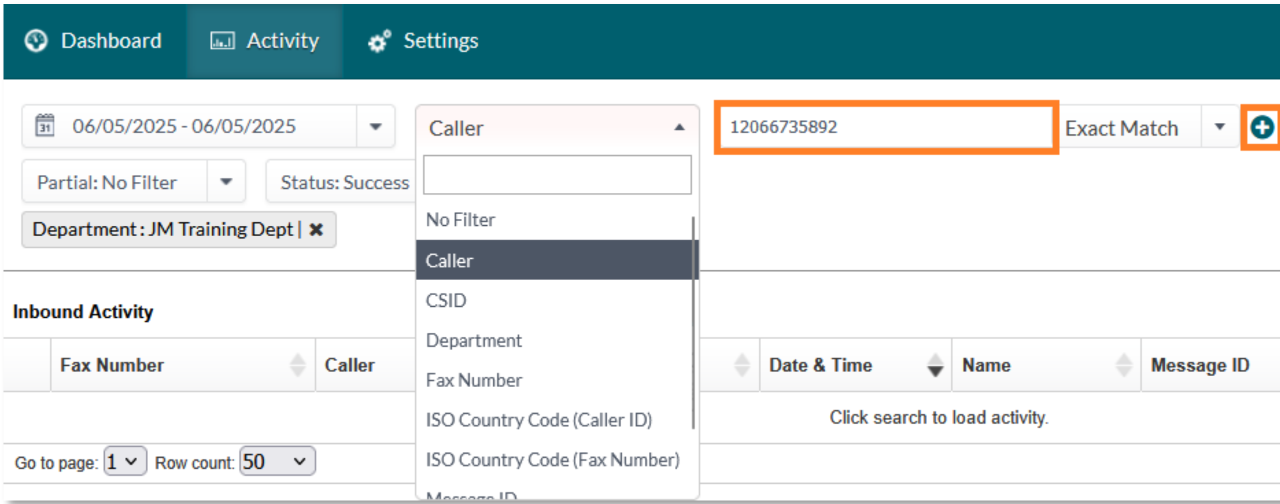
Click **Activity / Inbound Activity** to begin:



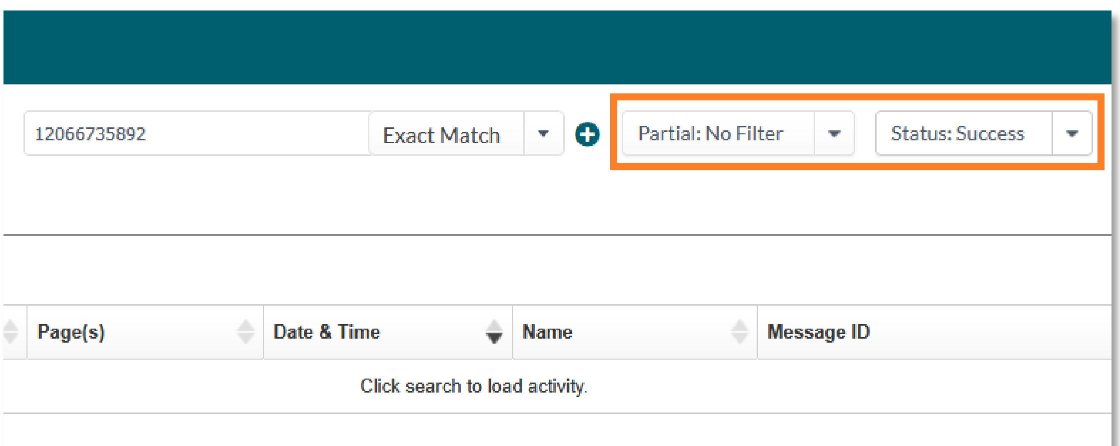
First, you may select the **Date Range** of the time period you want to search for results in. This must be a period within the last **90 days**:



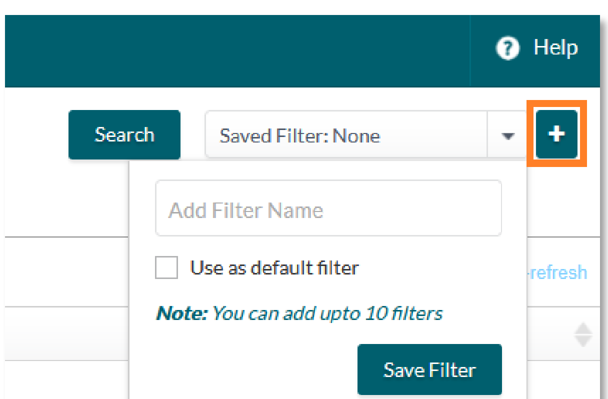
You may further refine your search by selecting a variety of **filters** such as department, your inbound fax number and/or the caller's sending fax number. You can layer filter criteria by clicking on the **CIRCULAR PLUS** symbol to add search parameters and enter new criteria:



You may apply additional layers of filtering according to the **receipt status** of the inbound fax. The **Partial** filter allows you to query for items that may been received in a partial state, while the **Status** filter allows you to query for calls that may have resulted in total failure:

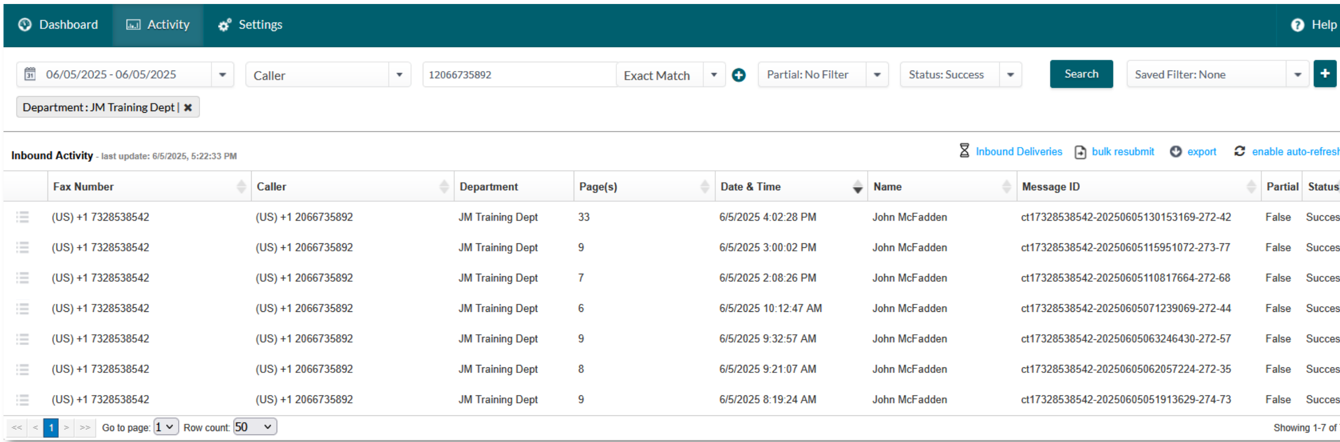


If you want to store your query for user later, click the **SQUARE PLUS** symbol to save up to 10 queries:

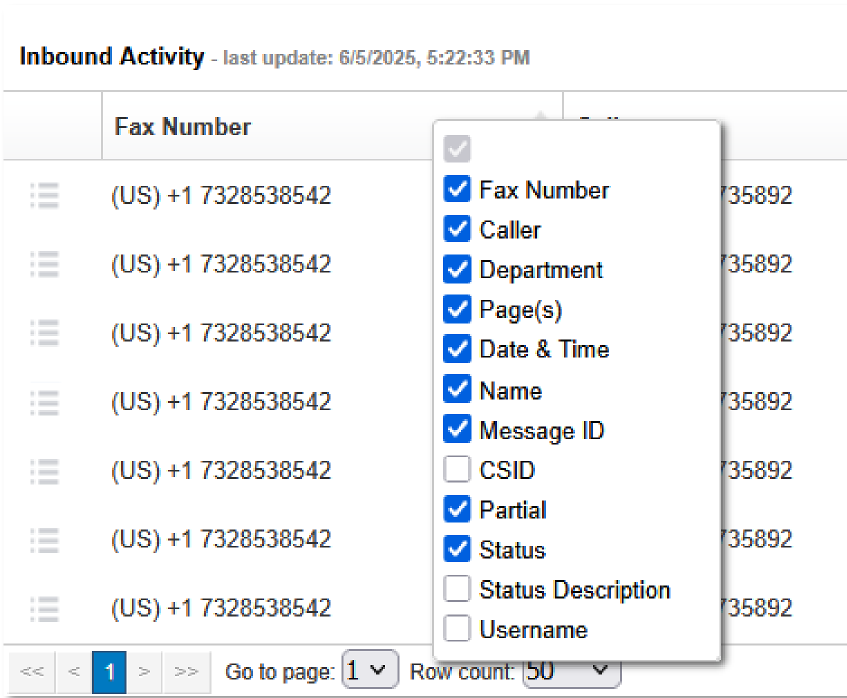


When you have entered your preferred filters and criteria, click **Search**.

All **inbound fax activity** within your selected range and filters will be returned:



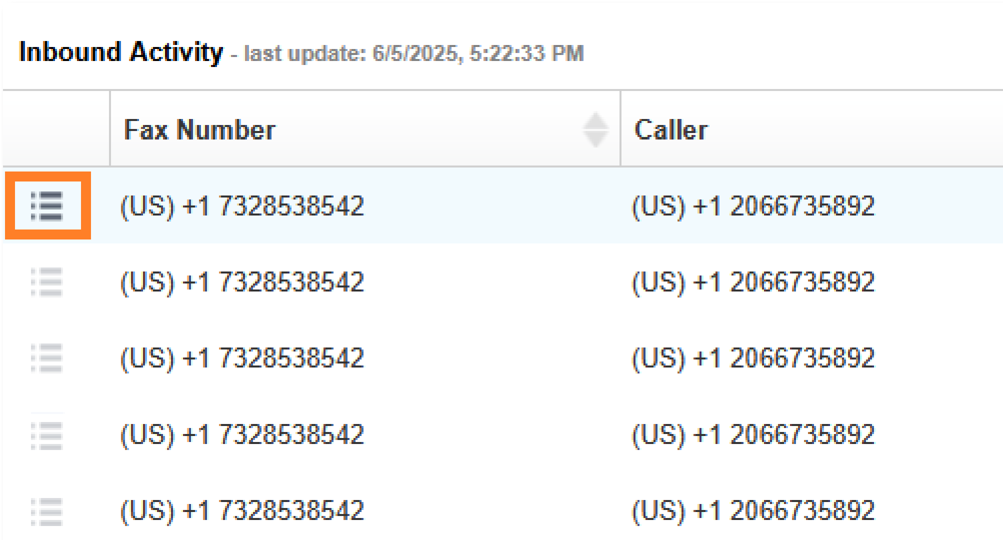
You can select which columns of data you want to display by **right- clicking** on the **column headers** and checking the **boxes** that correspond to the columns you wish to see:



You are also able to select the **number of records** you would like to see on each page, by selecting different values under **Row Count**: 10, 15, 20, 50, 100, 250, 500 or 1000.

Click **Export** to export results as a **CSV** file. The export will always include **all** columns possible.

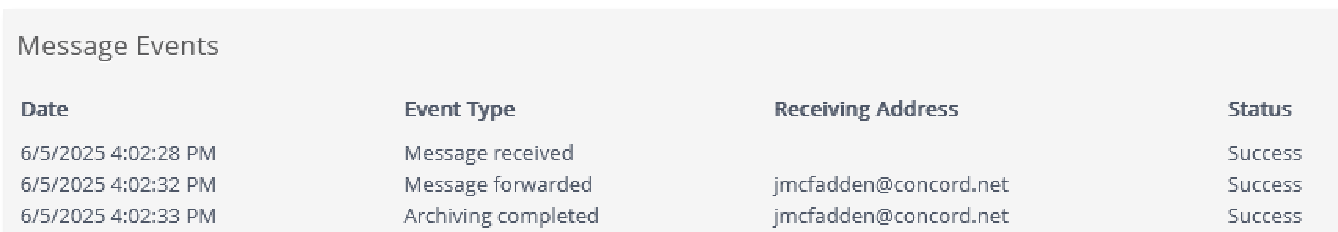
To view **Activity Details** for a specific Job ID and access the option to **resubmit** an inbound fax to its destination endpoint (depending on the service used) click the **Show Details** icon next to the Job ID you want to view:



Inbound Activity - last update: 6/5/2025, 5:22:33 PM

	Fax Number	Caller
	(US) +1 7328538542	(US) +1 2066735892
	(US) +1 7328538542	(US) +1 2066735892
	(US) +1 7328538542	(US) +1 2066735892
	(US) +1 7328538542	(US) +1 2066735892
	(US) +1 7328538542	(US) +1 2066735892

The **Activity Details** page will include detailed information about the inbound fax, including detailed Message Events pertaining to the receipt of the fax and the subsequent delivery of that fax to its destination(s):



Message Events

Date	Event Type	Receiving Address	Status
6/5/2025 4:02:28 PM	Message received		Success
6/5/2025 4:02:32 PM	Message forwarded	jmcfadden@concord.net	Success
6/5/2025 4:02:33 PM	Archiving completed	jmcfadden@concord.net	Success

Note that the **Events Type** and **Receiving Addresses** listed will depend on the method(s) being used to transport inbound faxes to their destination. These may include email, SFTP, HTTPS and Concord portal destinations.

From **Activity Details** you will also see the options to **resubmit** inbound faxes, as described below.

Resubmitting Inbound Faxes

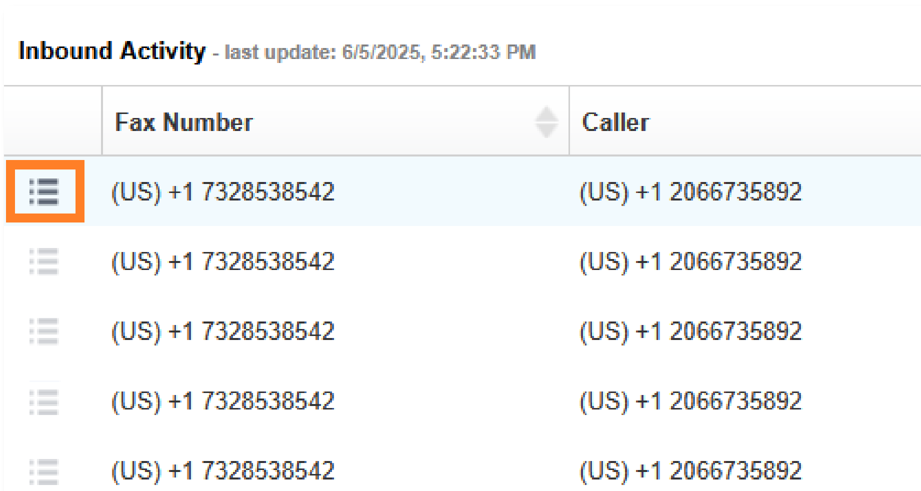
Depending on the **service** used and whether the document is still within the standard **7-day retention** period, you may have the option to **resubmit** inbound faxes to the destination configured in the user account associated with that inbound activity. This process will send a **copy** of the inbound fax document to the configured endpoint.

Resubmission may be performed for **most** inbound delivery types, including email, SFTP, HTTPS and Inbound Webservices. Resubmission is **not** an option for documents that are delivered to Concord **portal services** such as Fax Inbox, NEXTSTEP or Care Intake.

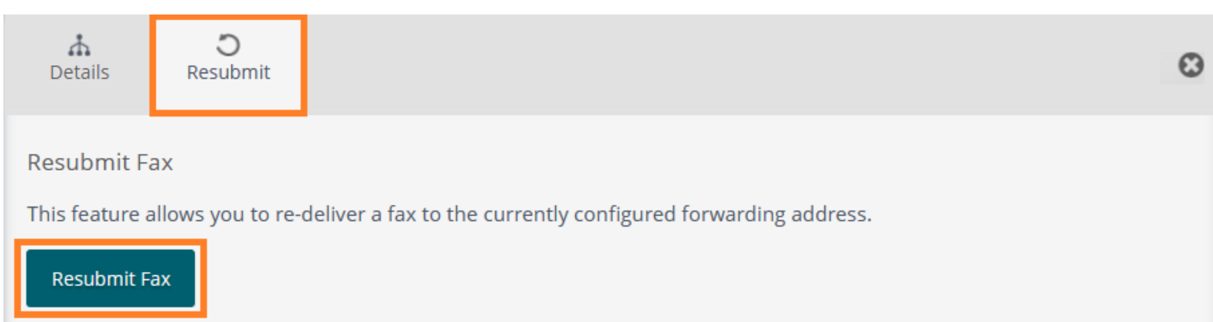
Note also that resubmission will utilize the **current** inbound delivery **method** and **destination(s)** configured in the associated user account. It is possible to **update** the user account following receipt of a fax, to edit the destination(s). Resubmission performed **after** an account edit is made will utilize the **new** destination configuration.

Resubmitting a Single Inbound Fax

To resubmit fax content for a **single inbound fax** job, click the **Activity Details** link associated with that fax item:

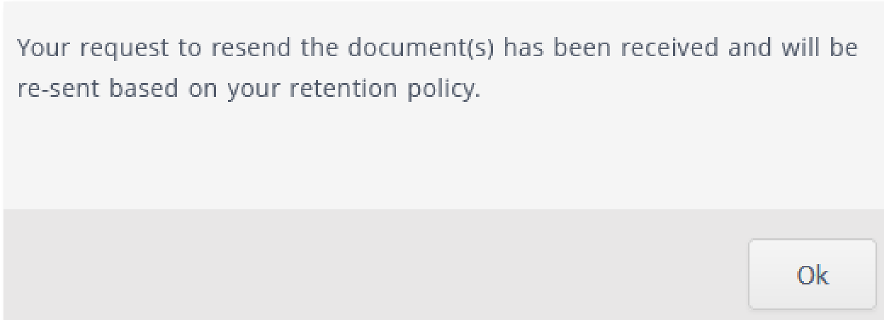


Next, click the **Resubmit** tab, and, when ready, **Resubmit Fax** to submit your resubmission request:

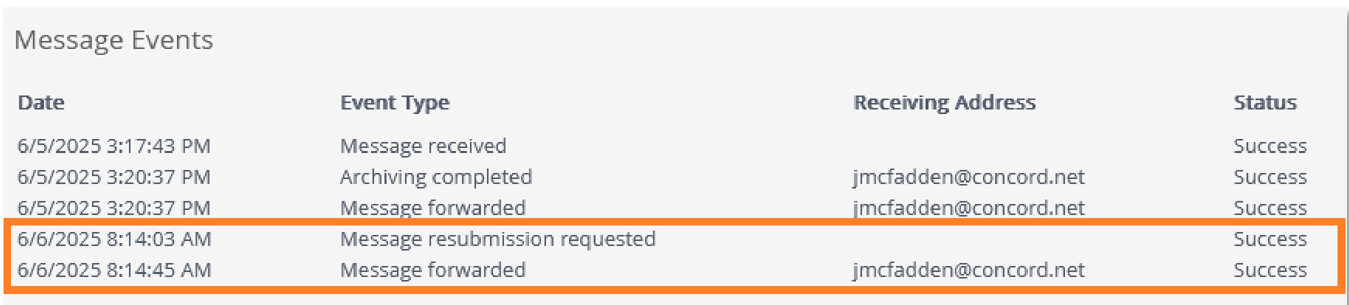


A notification will be displayed, indicating the request has been received and that the item will be resent, depending on the **availability** of the document content, according to your **retention** policy:

Concord TECHNOLOGIES



If the document is available for resubmission, the resubmission will be queued. The **Message Events** associated with the inbound forwarding of your fax content will display details on resubmission **request** and **delivery**:

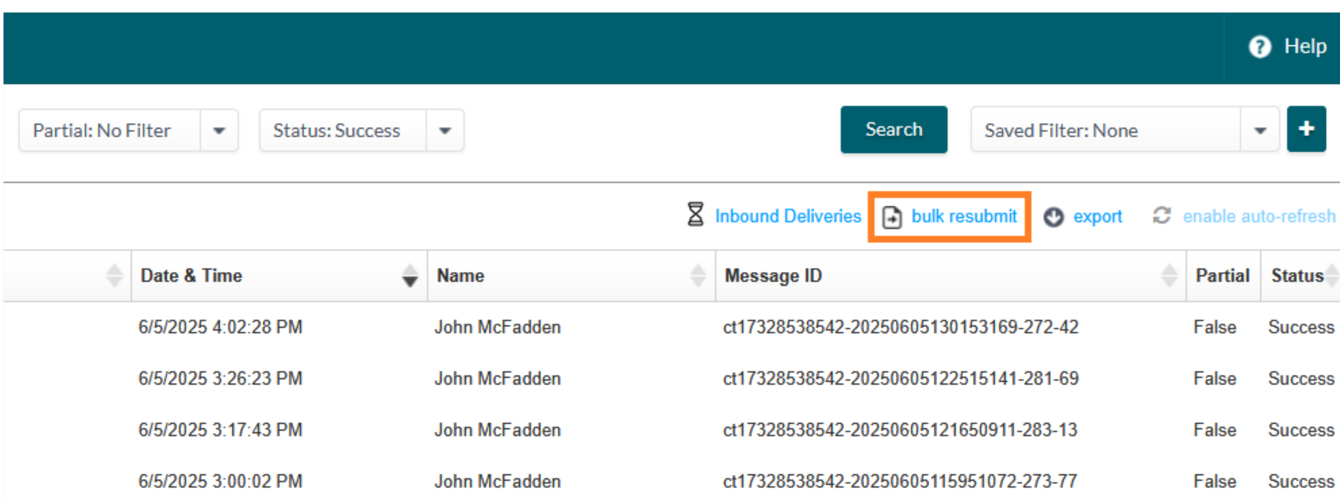


Message Events

Date	Event Type	Receiving Address	Status
6/5/2025 3:17:43 PM	Message received		Success
6/5/2025 3:20:37 PM	Archiving completed	jmcfadden@concord.net	Success
6/5/2025 3:20:37 PM	Message forwarded	jmcfadden@concord.net	Success
6/6/2025 8:14:03 AM	Message resubmission requested		Success
6/6/2025 8:14:45 AM	Message forwarded	jmcfadden@concord.net	Success

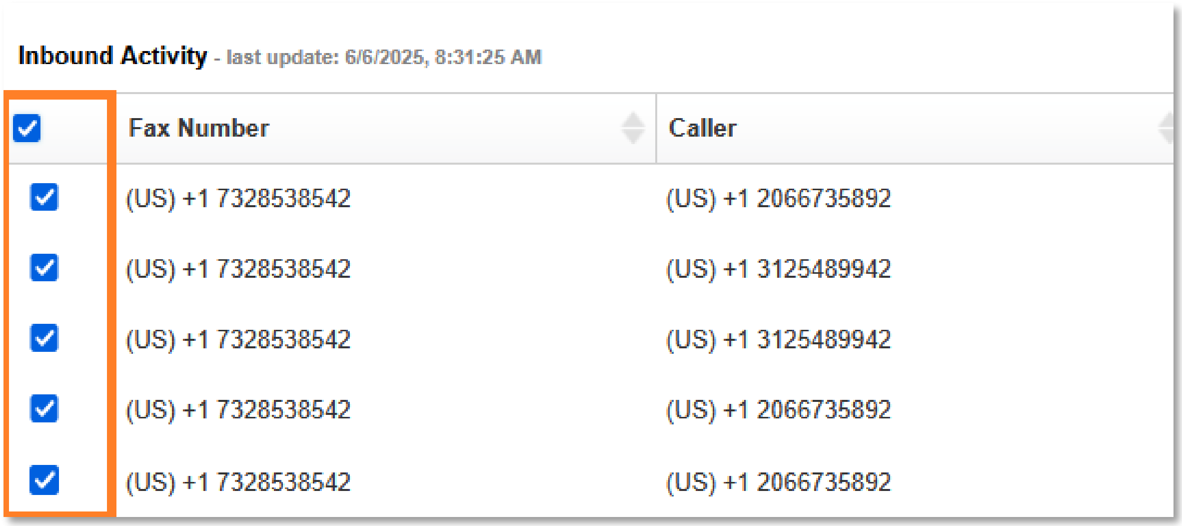
Bulk Resubmitting Multiple Inbound Faxes

It is also possible to resubmit **multiple** inbound fax documents at the same time using **Bulk Resubmit**. This will typically be used following a **query** to isolate a particular set of inbound faxes for resubmission. When the necessary items have been returned in your query **result**s, you can click **Bulk Resubmit**:

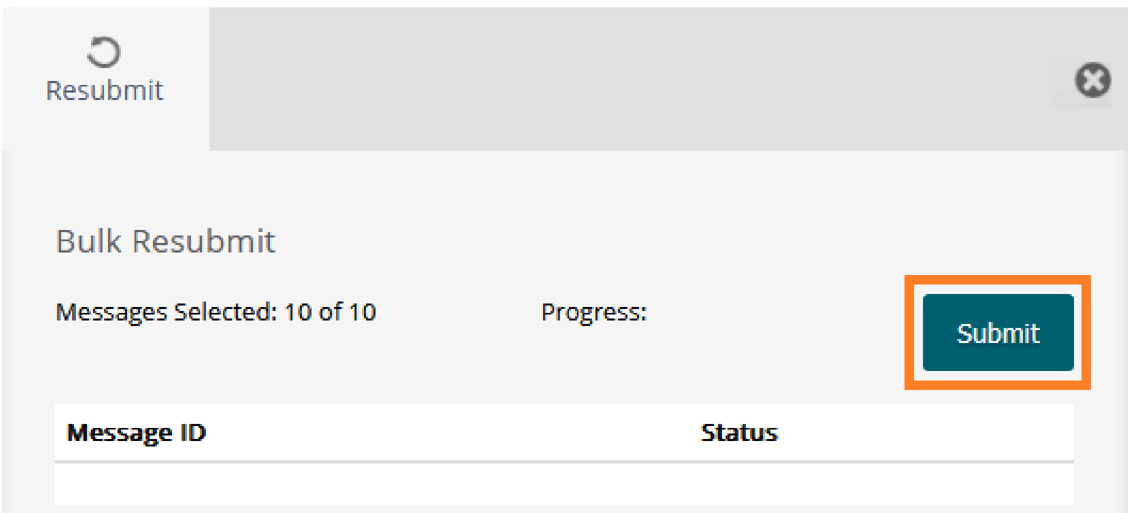


Date & Time	Name	Message ID	Partial	Status
6/5/2025 4:02:28 PM	John McFadden	ct17328538542-20250605130153169-272-42	False	Success
6/5/2025 3:26:23 PM	John McFadden	ct17328538542-20250605122515141-281-69	False	Success
6/5/2025 3:17:43 PM	John McFadden	ct17328538542-20250605121650911-283-13	False	Success
6/5/2025 3:00:02 PM	John McFadden	ct17328538542-20250605115951072-273-77	False	Success

Once Bulk Resubmit is clicked, you will see the option to **select** the items you want to have resubmitted. You may select **all** items returned in your query by clicking the top-most check box, or may individually select **each** item for resubmission:



As items are selected, the number of items will be noted in the **Bulk Resubmit** screen:



When all necessary items have been selected, click **Submit** to launch your resubmit request.

The resubmit request **results** will be displayed, indicating whether the request could be queued, depending on the availability of the document, as per your **retention** period:

Bulk Resubmit

Messages Selected: 10 of 10 Progress: 10 of 10

Message ID	Status
ct17328538542-20250605130153169-272-42	Success
ct17328538542-20250605122515141-281-69	Success
ct17328538542-20250605050216658-282-34	Success
ct17328538542-20250605062057224-272-35	Success
ct17328538542-20250605121650911-283-13	Success
ct17328538542-20250605110817664-272-68	Success
ct17328538542-20250605071239069-272-44	Success
ct17328538542-20250605051913629-274-73	Success
ct17328538542-20250605115951072-273-77	Success
ct17328538542-20250605063246430-272-57	Success

Re-delivery results may be found in the **Activity Details** of each resubmitted inbound fax job.

Accounting / CDR Report

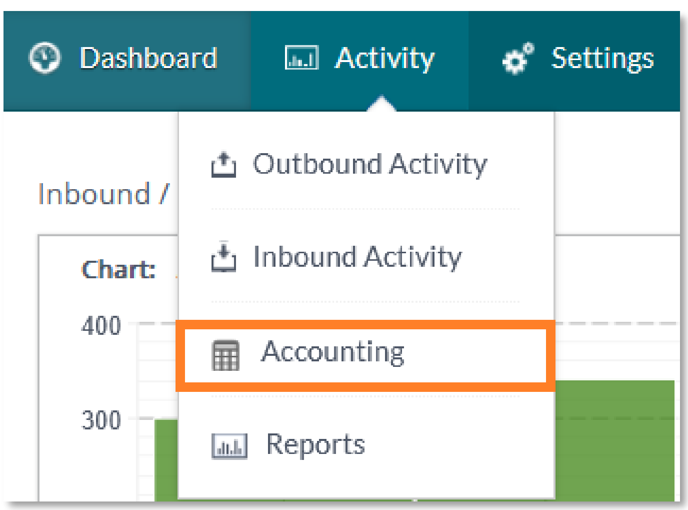
The **Accounting Report** (otherwise known as the Call Detail Record or **CDR** report) is a spreadsheet-based report that typically contains a record of each **billable** fax transmission sent or received on your company account during a **month**. This is often used to provide customers with the archivable details for all transmissions that are included in monthly **invoice**. The CDR report is found only at the **Company** level. Department level admins will **not** have access to this report.

CDR reports contain **transmission metadata** information, such as the number of pages delivered for a particular fax transmission. The actual **charges** for sent or received pages are **not** included in CDR reports. Concord has some capability to augment the content of the CDR report and other records, such as **non-billable failures**, may be included in your CDR by request.

By default, a new CDR report will be generated each **month**, containing the billable details for fax activity during the **prior** billable month**.** Should you need to request CDR data **before** the end of the month, you may generate CDR data for the current month by request.

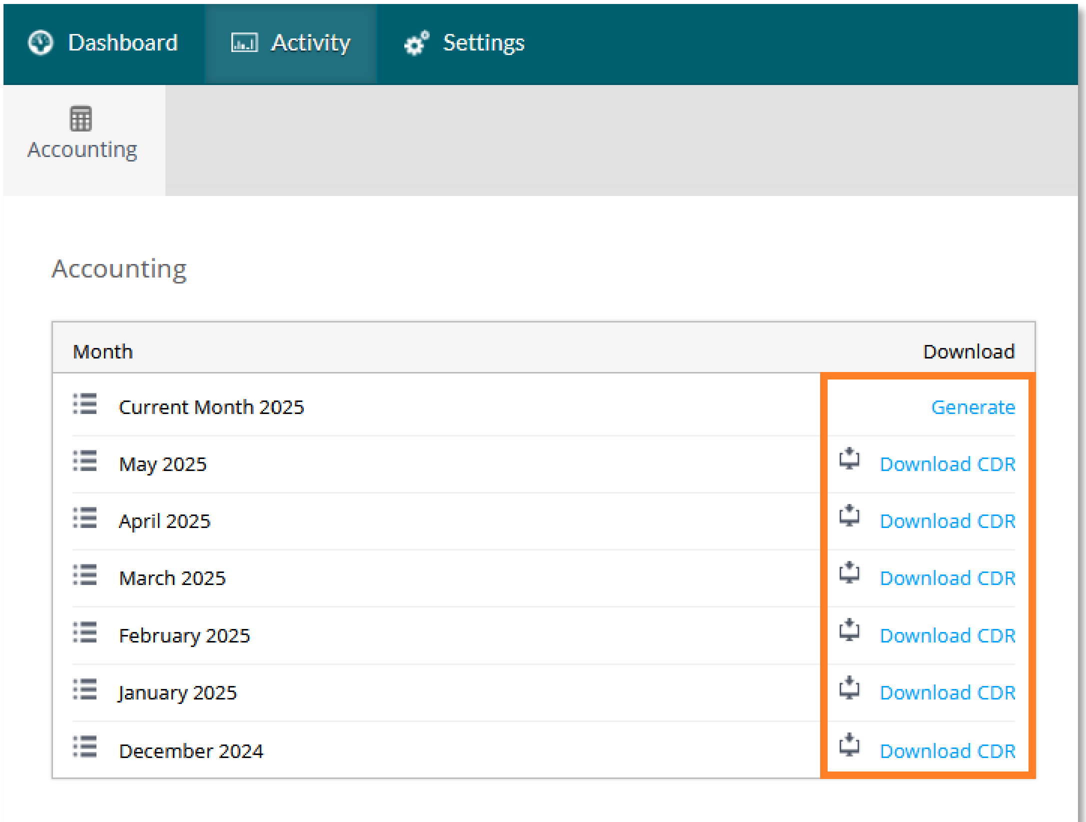
Note that full **monthly** CDR reports and the ability to generate a **current-month** report are also available as **automation** features, accessible via Concord **API** webservices. Please see Concord's Developer Portal for more information on automating CDR report retrieval.

To access CDR reports via the Cloud Fax Admin Portal, click **Activity / Accounting:**



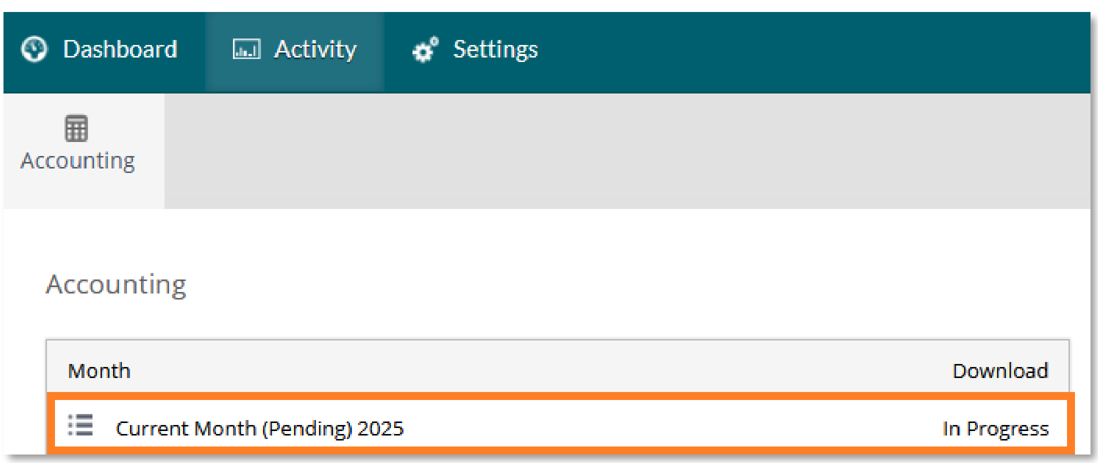
This opens to a list of the last **6 months** of stored CDR reports, downloadable as single comma-separated **CSV** files, in a **ZIP container**.

This also allows for the generation of the **current-month** CDR, up to and including the **previous days' activity**:



Click the appropriate link to download a complete **full-month** CDR or click **Generate** to create a **current-month** CDR export of each day's activity.

If you choose to **Generate** a current-month CDR, you will see the generation of the report update to **In Progress:**

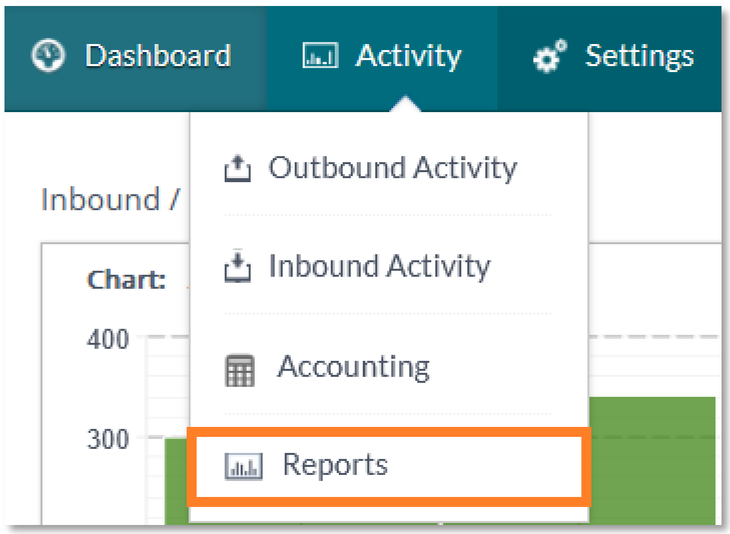


When the report is generated, a **Download** link will be presented. Click to download a ZIP file containing a **separate** CSV file for **each day** where billable activity occurred.

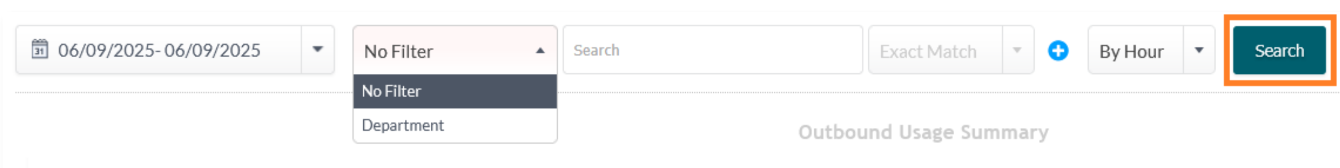
Reports

The **Reports** section of the Cloud Fax Admin Portal contains **analytic** and **performance** reports on inbound and outbound fax activity. These reports are available at the **Company** and **Department** levels for a platform-standard **90 days**. Results may be **filtered** according to Department and/or time period and may be **exported** as a table.

The reports are divided according to the **outbound** and **inbound** flow of fax traffic and each direction has its own specific reports. To access Reports, click **Activity / Reports:**



This opens to a screen where you can **select** the outbound and inbound reports you wish to see. To set **filters** for department and/or time, make your choices and click **Search**:



This will set the **default** filers for any reports you select going forward. Results may be displayed **By Hour** or **By Day.** Once the defaults are set, you may proceed to click to **view each report**.

Outbound Reports

Average Time-to-First-Dial: This provides data related to the amount of time messages spent **processing** within Concord's platform, between the time of receipt and the time Concord made the first fax delivery attempt.

Average Total Completion Time: This provides the total time related to the **processing**, and fax **connection** for outbound messages in a given period.

Frequent Busy Destinations: This report provides a **Top 50** list of recipient fax numbers that return Busy tone when messages are sent to these numbers, including the total number of Busy attempts for each fax number.

Highest Volume Destinations: This provides a **Top 50** list of fax numbers that users and/or applications in your organization are sending the most faxes to, including the total fax counts for each number.

Outbound Failures: This report offers a visual breakdown of fax **delivery errors** according to error code (Busy, No Answer, Voice Answer, etc) along with totals for each error type encountered during the selected period.

Usage Summary: The Outbound Usage Summary provides an **overview** of fax traffic for a given interval, including successful and failed fax count, total pages and average page count per transmission.

Inbound Reports

Av**erage Time-to-First Forward:** This report provides metrics on the time Concord spent **processin**g a message following fax receipt, to prepare the message for delivery to the destination endpoint for that fax number (email, FTP, webservices, etc.).

Highest Volume Numbers: This provides a **Top 50** list of a customer's **most active** inbound fax numbers and data related to successful and failed transmissions on those numbers.

Potential Partial Faxes: This report displays metrics related to whether messages may have been **partially received**. This includes an overall Partial Rate percentage of total traffic. Note that these messages are considered **Potential Partials** as a fax may be fully received in terms of pages but may not receive the proper termination that allows Concord to confirm complete receipt.

Transmission Failures: This report provides metrics on **failed inbound fax** receipt including inbound calls that fail to transmit fax data, as well as messages deemed potential partials.

Usage Summary: The Inbound Usage Summary provides an **overview** of inbound traffic for a given period, including successfully received and failed fax transmissions, total pages and the average page count per fax message.

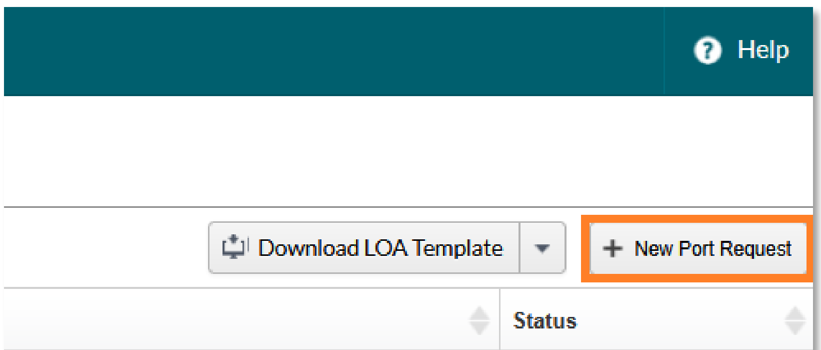
Number Porting

As Concord customers migrate fax traffic from **other** services and providers, most will choose to retain their pre-existing, published fax numbers by **porting** their fax numbers to a **new carrier** servicing Concord's inbound fax network. This is most often accomplished by working directly with Concord **Premium Support**, but the Cloud Fax Admin Portal may also be used on occasion to manage ports.

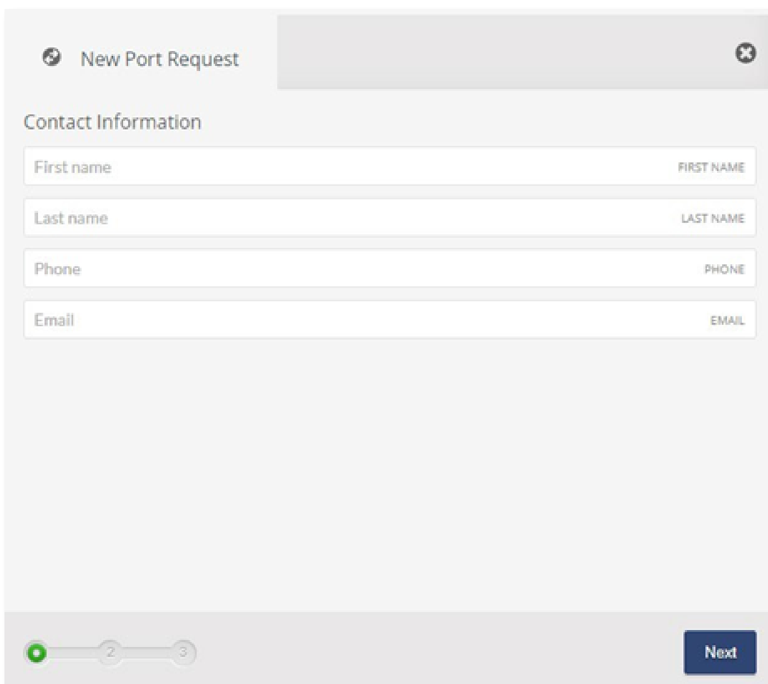
Administrators may initiate new and manage existing port requests in the Number Porting section of the Concord Admin Portal via **Settings/Number Porting**.

Initiating a New Port Request

To start a new port, click **+New Port Request** on the left-side of the screen:

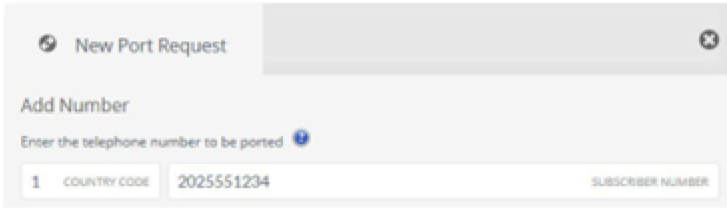


You will then be prompted to enter Contact information, should Concord need to request further information to complete the port:



When complete, Click **Next**.

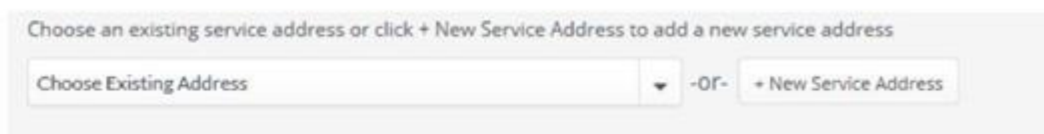
Enter the **Country Code** and **Subscriber Number** (porting number) in the noted fields:



Enter the **Billing Telephone Number** in the noted field. If the Billing Telephone Number is the same number that is porting, **check** the appropriate box:

A note on the **Billing Telephone Number**, or **BTN:** Each phone or fax number is assigned a BTN by the carrier. It shares the same 10-digit formatting as a phone number (area code + 7-digit local number). The BTN may not be obvious, or self-evident, and should always be **confirmed** by the losing carrier. The losing carrier will provide the user with a **Customer Service Record**, or CSR. The Customer Service Record includes the BTN, the registered name of the company or organization, and the service address of the porting number. Telephone privacy and security policies **prevent** anyone but the owner of the number from obtaining the Billing Telephone Number.

Click on **+ New Service Address*** to add the service address associated with the porting number:

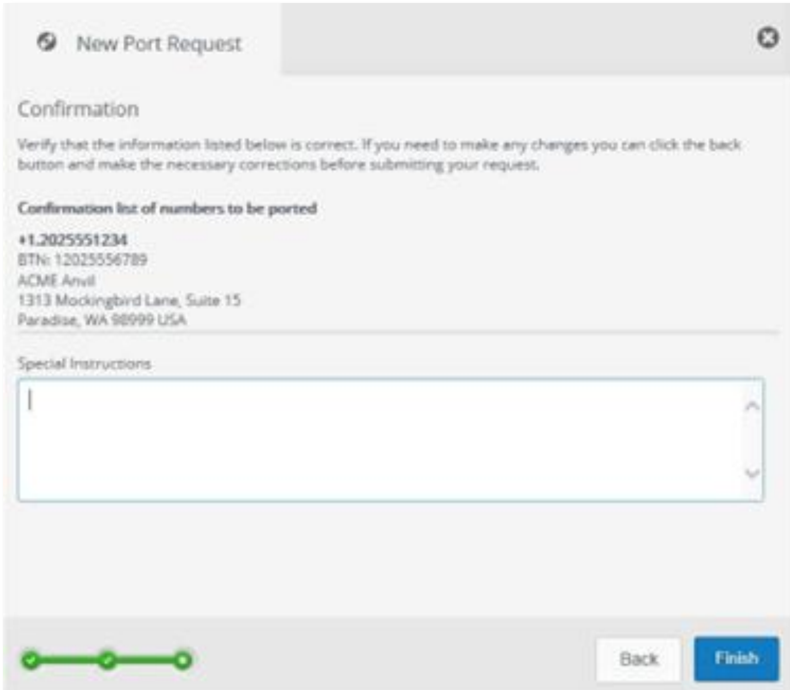


The service address may **differ** from the billing address. Your carrier will be able to confirm the Service Address of the porting number. Again, this information is contained in the **Customer Service Record**.

If the Billing Telephone Number, Name, or Address information does not match the information contained in the Customer Service Record (CSR), the port can be **rejected** by the losing carrier. To prevent unnecessary rejections and delays, Concord asks that you **include a CSR** with every port request.

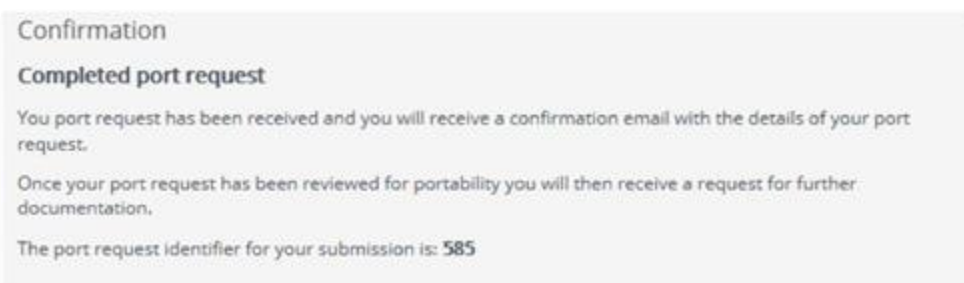
After entering the Name and Address information, click **Next**.

A **summary** of your request will be displayed:



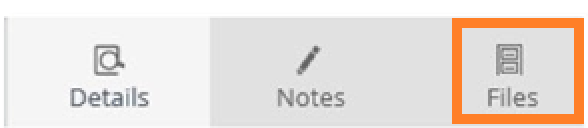
Confirm that all of the request information is correct. If there are details that you would like to include with your request, you may include them in **Special Instructions**.

When ready, click **Finish**.
You will then receive a pop-up confirming that your port request has been successfully submitted to Concord, including your tracking number for future reference:



Now that the port request has been created, you will need to attach a valid Letter-of-Authorization and current Customer Service Record. ***Concord cannot port your number(s) without this documentation!***

To add files to your port request, click on the ☰ icon. You will now see three tabs on the right-hand side of the Web Portal:



Click on **Files** to upload the necessary documents.

If you would like to leave a note for the Concord porting team, click on the **Notes** tab. Progress notes and updates from the Concord porting team will also be displayed in this section.

Tracking a Current Port

By clicking on **Number Porting** under the **Settings** menu option, a list of current ports will be displayed:

You can see an expanded view of the details of the port, by clicking on the **Details** icon: .

You are enabled to make **changes** to this information, however, once your port is in process, you will need to contact Concord **Premium Support** if any of the changes need to be communicated to the losing or winning carriers (e.g., a new address, BTN, etc.).

By clicking on the **Notes** tab, you can read updated notes left by the Concord porting team, as well as leave notes for Concord to assist with the porting process.

You can attach additional documents, if needed, by clicking on the **Files** tab.

The **ID** column lists the tracking ID assigned by Concord.

The **Business Name** lists the name of the company associated with the port.

The **Created** column lists the date the port initiated.

FOC, or **Firm Order Commit** lists the scheduled port date, agreed to by both the winning and losing carriers. When an FOC date is established, Concord will update the order with this date. Further, the porting contact will also receive an **email** message from Concord.

Completed lists the date the port was completed, when a port has completed.

Status lists the **processing** state of port request. The following **status designations** can be displayed:

- **New -** The default status for all new requests. The Concord porting team has not taken additional steps to process the port with the losing carrier.
- **Pending** - Concord has reviewed the request and has begun communication with the losing carrier
- **In Progress** – Similar to Pending. Indicates that the losing carrier has requested additional information.
- **Scheduled** – A port date has been committed to by the losing and winning carriers.
- **Rejected** – The losing carrier has rejected the request. Specific reasons will be included in the **Notes** section.
- **Cancelled** – The request has been cancelled by the Concord porting team.

- **Completed** – The number has ported to Concord's network.

Concord will update your port order a minimum of **three times**. Each of these updates are accompanied by an email to the **requesting party**:

- Concord will update the requesting party with an **estimated port date** upon submission of the request to the losing carrier. Provided all information contained in the Letter-of-Authorization and Customer Service Record agree with the information on record with the losing carrier, this estimated date will most likely be confirmed.
- Concord will update the requesting party when the port date has been confirmed and **committed** to by the losing and winning carriers.
- Concord will update the requesting party when the port has successfully **completed**. Each port is tested by Concord, confirming that inbound traffic is routing through the Concord network.

In the event your carrier has **rejected** the port request, Concord will update the status of the request in the Web Portal, as well as send an email to the requesting party indicating the **required action** necessary to proceed with porting the number.

Most ports complete within **ten business days**. If there is any rejection, the resubmission process **restarts** at the beginning. To avoid delays, always ensure that the information contained in the LOA and CSR is correct, confirming it with the losing carrier.

Appendix - Concord Fax Transmission Error Statuses

BUSY

"Busy" indicates that the called number (phone line) is already in use or engaged.

Exceeded ECM Retransmit

"Exceeded ECM Retransmit" indicates the call was answered by a fax device and connected using ECM or Error Correction Mode. The failed attempt required an excessive amount of data to be retransmitted to the receiving device prior to confirming acknowledgment of successful transmission completion. The call was aborted to allow a retry or new attempt to get a better connection.

Fast Busy

"Fast Busy" indicates that there was no available path to the receiving fax number. This normally indicates that the destination is currently not reachable. This may be caused by an outage, severe weather conditions, circuit overloads, or other conditions. In many cases, “Fast Busy” conditions are temporary. Please confirm the validity of the fax number by calling from a handset device. If the recipient answers with a fax tone, but a fax fails when sending through Concord, contact customer service for further assistance.

General Error

"General Error" indicates that another uncommon error not listed has occurred, resulting in the failure to transmit the fax. Please retry the fax job. If you receive the same error, please contact Concord Premium Support for further assistance.

Invalid Attachment

"Invalid Attachment" indicates the attachment is not one of the file types listed below, the document should be converted into a supported format.

- TIF/TIFF (Tagged Image File Format) G3/G4 ***Black & White only***.
- TXT (Plain Text)
- RTF (Rich Text Format)
- DOC, DOCX (Microsoft Windows - Word 97-2019 and Office 365
- XLS, XLSX (Microsoft Windows - Excel 97-2019 and Office 365
- PPT, PPTX Windows PowerPoint 97-2019 & Office 365
- PDF (Adobe Portable Document Format) - (v1.0-v1.7)
- VSD (Microsoft Visio Windows - Visio 2000-2016)
- JPG/JPEG (Joint Photographic Experts Group - **Strongly discouraged/ Not Advisable.**
- GIF (Graphics Interchange Format) **- Strongly discouraged / Not Advisable.**
- PNG (Portable Network Graphic) - **Strongly discouraged / Not Advisable.**

Invalid Fax Number

"Invalid Fax Number" indicates a problem with the destination fax number. You must address the fax request with the full fax number, including area code (including Country Code for international fax) Please correct the fax number and try again.

Job Cancelled

"Job Cancelled" indicates that the job or recipient number was cancelled or the set time for delivery expired.

Negotiation Failed

"Negotiation Failed" indicates the call was answered by a fax device but during the initial training phase of the call, communication between the fax transmitter and the receiving fax device failed or the two devices could not agree on the parameters to be used for the call. This often indicates a phone line quality issue and may occur at the beginning of the fax transmission, or during the fax transmission between pages on a multi-page fax.

No Answer

"No Answer" indicates that the line was not picked up (answered) by a fax machine or person before timing out. The timeout is sufficient to ensure at a minimum of 58 standard rings, which is actually a duration of 55 seconds.

No Attachment

"No Attachment" Indicates that there was no document attached to the fax request. You must attach the document you wish to fax in an accepted format, such as .DOC or .PDF.

Not a Fax Machine

"Not a fax machine" indicates that a fax device has failed to answer the call. Specifically, fax tones or the fax signal from a remote machine has not been detected. This may happen for a number of reasons, including but not limited to, a wrong number, a machine not configured to automatically answer, or a device that has stopped answering because it is out of paper or has a paper jam.

Sit-Tone / Operator Msg

"Sit-Tone / Operator Msg" indicates that the call was intercepted by the special situation information tones followed by an operator message, examples include "The number you have dialed is disconnected or is no longer in service. Please check the listing and try your call again.", "The number you have dialed has been changed…the new number is…XXX-XXX-XXXX", "All circuits are currently busy, please try your call again later". "Operator Msg" indicates the same issue however the special situation information tones were not detected.

Transmission Failed

"Transmission Failed" indicates the receiving fax machine has answered and connected but the fax was not able to be fully and successfully transmitted. This can be caused by line quality issues, fax device issues, the sharing of phone line with other devices such as credit card processing terminals. Temporary conditions such as severe weather conditions in the destination area can also cause transmissions failures.

Unauthorized Sending Address

"Unauthorized Sending Address" indicates that the email address from which an email-to-fax request was sent is not registered with Concord. The origin email address must be added as a valid sender via the Concord Web Portal.

Voice Answer

"Voice Answer" indicates that either a person or voicemail message answered the call.

Getting Help

Concord's **Premium Support** team is available Monday–Friday from 6:00 AM to 6:00 PM (Pacific Time).

Phone: +1 (206) 441-3346

Email: premiumsupport@concord.net

Web: https://concord.net/about/contact-us/